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ABSTRACT

This workbook was created as a "do it yourself" tool for helping organizations and career counseling services develop policies and standards to enhance the quality of services. The process is aimed at helping articulate policies that are sensible for each organization and challenging and achievable by staff. It is intended to be a resource to agencies that provide career and career-related services. This guide attempts to assist career counseling providers in responding well to the increased demands for accountability. It is designed as a human resource planning and staff development planning tool for the agency and those persons responsible for delivering career counseling services. It also provides a structured process for working thorough quality of service issues to determine what is appropriate and achievable. Five chapters include: (1) "Introduction"; (2) "Policy Self-Assessment"; (3) "Policy Statement Development"; (4) "Human Resource Planning Self-Assessment"; and "(5) "Staff Development Planning. (JDM)

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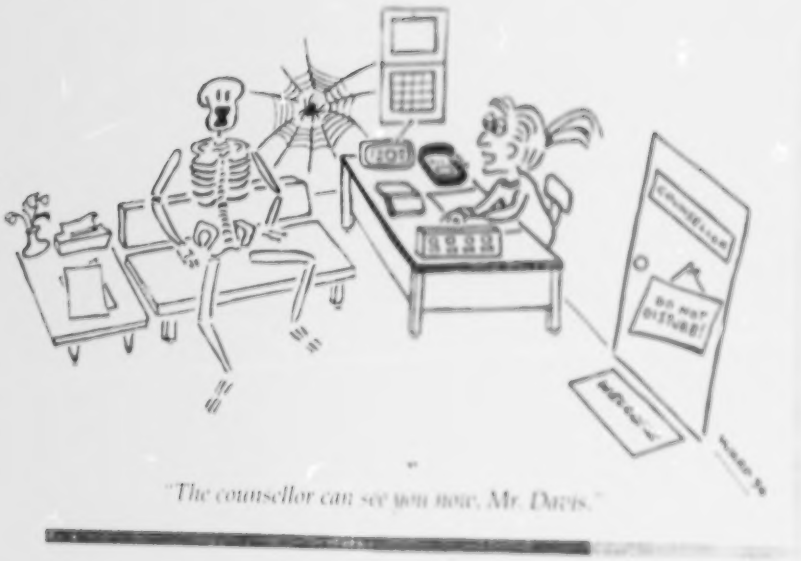
Quality Career Counselling Services
A Policy Workbook



"The counsellor can see you now, Mr. Davis."

Dorothy I. Riddle
M. Lynne Bezanson

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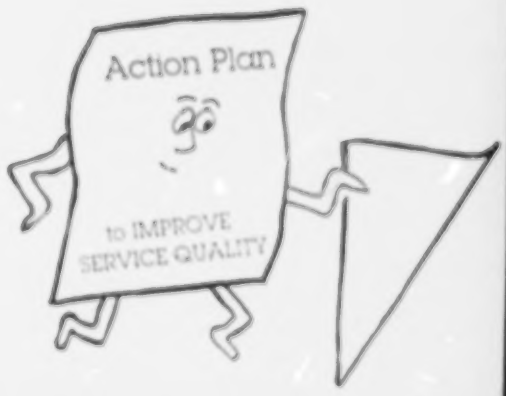

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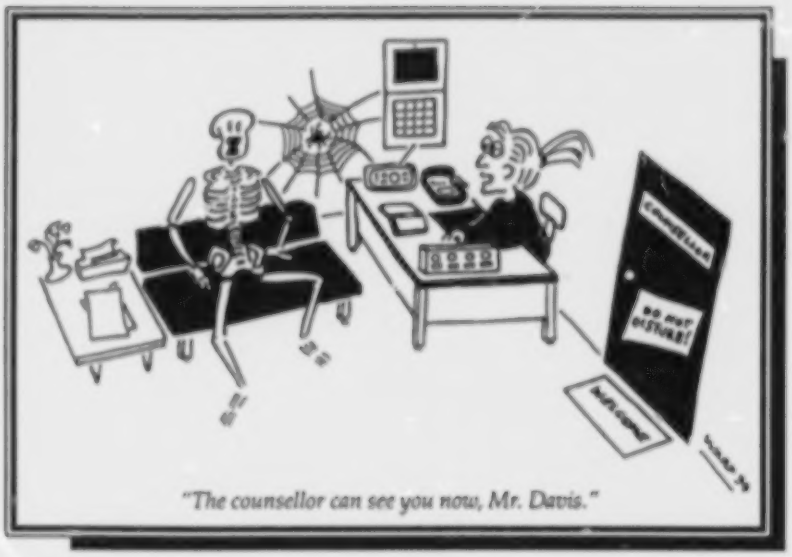

"The counsellor can see you now, Mr. Davis."

Dorothy I. Riddle
M. Lynne Bezanson

illustrated by Valerie G. Ward

WELCOME to QUALITY CAREER COUNSELLING SERVICES A POLICY WORKBOOK!

Dorothy I. Riddle
M. Lynne Bezanson

illustrated by Valerie G. Ward

This book was produced and published by
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Foreword

We invite you to experiment with the Policy Workbook as a "do it yourself" tool for helping your organization develop policies and standards to enhance the quality of your services. We have tried to make the process in the Policy Workbook sufficiently generic to be useful in a wide range of settings, while providing materials specific to career counselling services. We hope that the Policy Workbook will help you by:

- "Demystifying" policy formulation and involving all levels of staff
- Presenting service standards as developmental tools for continuous improvement in meeting client expectations
- Helping you "walk the talk" in your own staff development

The Part One exercises support quality service to clients, while the Part Two exercises support quality service within the organization. Enjoy!

Acknowledgements

This Policy Workbook is one of many contributions to the advancement of career counselling in Canada which have resulted from the CAMCRY (Creation and Mobilization of Counselling Resources for Youth) initiative. CAMCRY was a three-year research and development partnership, funded by Human Resources Development Canada and matched by universities and other research partners across Canada. It was managed by the Canadian Guidance and Counselling Foundation (CGCF) and involved a large national network of career development partners. CAMCRY resulted in innovative and leading edge programs, resources, tools and methods for youth and young adults to help them be successful in managing their career preparation, decisions, and transitions in today's rapidly changing labour market. It also resulted in state-of-the-art training programs to help those who work with youth provide the best quality career services. We gratefully acknowledge Human Resources Development and the national network of partners for their financial and professional support of the full CAMCRY initiative.

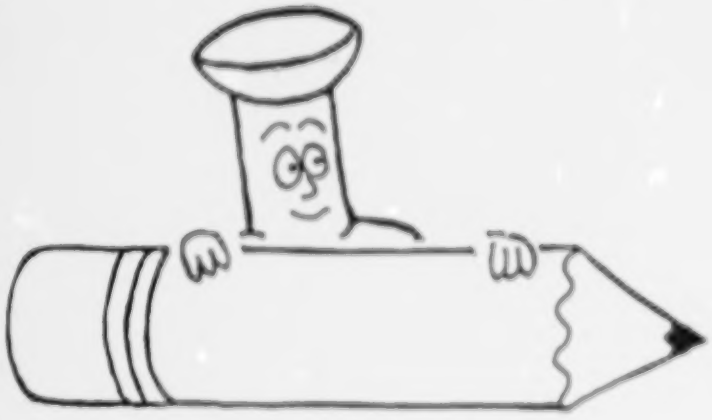
The Policy Workbook would not exist without the vision of the National Advisory Committee of CAMCRY, who recognized the need for a tool to help organizations develop policies and standards for career counselling services. We would like to express our appreciation to the members of the CAMCRY Policy and Standards Subcommittee: Mildred Cahill, Gail Kovacs, John Caldwell, and Lee Wallace. We also want to thank the organizations that took the time to field test various portions of the Workbook and provide invaluable feedback:

- Career Probe Inc.
- Centre for Career Development Innovation, Concordia College
- Halifax County/Bedford District School Board
- Memorial University of Newfoundland
- University of Calgary
- Metro Toronto Social Services
- Osgoode Township High School
- Scarborough Centre for Alternative Studies
- Department of Education, Northwest Territories
- University of Manitoba
- Outreach projects (coordinated by HRD)

While we provided the process and the words, Valerie Ward has brought them to life with her illustrations. She has helped us "walk the talk" by associating adventure and fun with the development of policies and standards. We want to thank her for generously giving so much of her time to making the Policy Workbook content accessible and inviting to users.

Chapter 1

INTRODUCTION



Career development:

the process during one's lifespan through which persons define the themes that connect and integrate their work experiences and achieve career-related objectives

Sample career counselling services:

- career education
- career exploration
- career/life planning
- acquisition of career/life skills
- placement-related activities including job search and résumé preparation
- resolving work and career conflicts and problems

Career counselling includes:

- individual services
- group services
- programs and courses

to assist persons to acquire and apply self-understanding in relation to:

- education
- training
- career and work decisions

The focus of career counselling may be on helping the person to:

- acquire specific decisional, life and technical skills
- undertake actions which promote personal development and career/work satisfaction
- develop a sense of continuity and purpose in work and other life roles
- assess and resolve questions or conflicts related to successful employment

Chapter 1

Introduction

Career Counselling in Context

Career counselling services are part of the broader range of career development activities. We think of *career development* as being the process during one's lifespan through which persons define the themes that connect and integrate their work experiences and achieve career-related objectives. As such, career development encompasses a wide range of activities that help persons create opportunities for progress and satisfaction in their work.

Career counselling includes individual services, group services, programs and courses to assist persons to acquire and apply self-understanding in relation to education, training, career and work decisions. The focus of career counselling may be on helping the person to acquire specific decisional, life, and technical skills; undertake actions which promote personal development and career/work satisfaction; develop a sense of continuity and purpose in work and other life roles; and/or assess and resolve questions or conflicts related to successful employment.

Many different types of agencies currently provide career counselling services to Canadians through over 30,000 points of service, ranging from schools to employment centres to custodial homes. For some agencies, career counselling is the primary or only service provided. For others, career counselling comprises only a small portion of the client services rendered. Some providers offer a full spectrum of services, while others focus only on developmental issues or job acquisition or professional development planning.

Rationale for This Workbook

The world of work is changing rapidly and dramatically. Labour markets now compete globally and demand highly skilled and trained work forces. A growing number of Canadians will change career directions several times in their working lives. Some will do so as part of their planned career paths. For others, it will be as a result of industrial restructuring, downsizing and job loss.

As a consequence, career counselling services are assuming a high priority as Canadian workers seek assistance to manage their working lives. Parents are demanding that their children receive comprehensive career education programs to assist them in making strategic educational and training choices. Employers are requiring well-prepared entry workers who also have high levels of personal and interpersonal competence. Governments are increasingly emphasizing human resource development for individuals, employers and communities and can be expected to turn more attention to the role and contribution which career counselling can make.

Career counselling services are very diverse. They are provided by many jurisdictions — with educational institutions, employment departments in all levels of government, a wide range of community based agencies, and individuals in private practice being examples. The content of the services varies widely. Some services focus primarily on placement-related activities including job search and resume preparation. Some concentrate on career education and career exploration, while others emphasize career/life planning and the acquisition of career/life skills. Still others are focused on resolving work and career conflicts and problems.

It is frequently not clear to persons and jurisdictions outside the career counselling community exactly what types of career and career-related services are provided by whom, where and how to access these services and what quality of service is reasonable to expect. As career counselling services become more visible, the demand for high quality services will also increase. It will be both expected and essential that those in the business of career education and counselling be clear and articulate about:

- The *services* offered and the *standards* for those services
- The *outcomes* which are pursued and normally achieved
- The *mechanisms* in place to avoid duplication with other service providers and co-ordinate services to the individual or group
- The minimum *qualifications* of those who provide service

This *Policy Workbook* is intended to be a resource to agencies and jurisdictions which provide career and career-related services. It is intended to make a contribution in several areas at the same time:

> *First*, it is a guide to assist career counselling providers in responding well to the increased demands for accountability that are likely to accompany increased visibility. What should emerge from using the Workbook is a cohesive set of eight policy statements, with supporting standards and guidelines, that can be communicated both to users and to funders.

Secondly, it is designed as a human resource planning and staff development planning tool for the agency itself and those persons responsible for delivering career counselling services. What should emerge from using the Workbook is a profile of actions needed to strengthen staff competencies and examine adequate resourcing of services.

Thirdly, it provides a structured process for working through quality of service issues to determine what is appropriate and achievable. What should emerge from using the Workbook is enhanced service delivery to the user — the client or student or employee who is assisted through career counselling services.

Finally, in designing this Workbook process, the Canadian Guidance and Counselling Foundation is asking to receive copies of completed policy statements that agencies develop in order to begin to create a sense of national priorities and strategies. What may emerge is a set of model policies that can help guide the development of national quality standards for career counselling.

Purpose of This Workbook

This *Policy Workbook* is a self-help tool for developing quality career counselling services for all Canadians.

Quality services require clear policies and guidelines on:

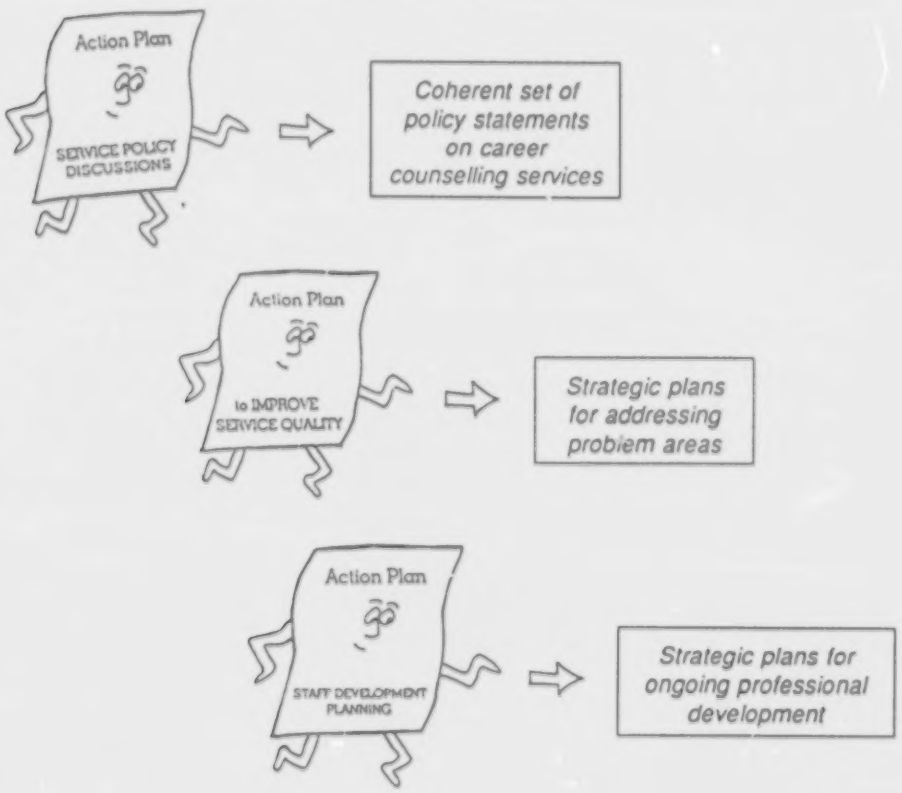
- What services will be available
- Who may receive those services
- Who provides them, with what qualifications
- To what standards
- What managerial support is required
- The accountability framework for providers

Part One of the Workbook concentrates on the services to the client. It addresses the components of a quality service, provides tools to assess each component,

identifies areas which could be strengthened, assists in setting priorities for change, and outlines steps that can be taken. Chapter 2 contains a self-assessment tool for evaluating your present policies. Chapter 3 provides "discussions" to help develop or strengthen your policies.

Part Two of the Workbook addresses staff development, beginning again with a self-assessment tool in Chapter 4. The planning guides in Chapter 5 have been developed on the premise that, if quality career counselling is to be delivered (as per Part One), staff at all levels of the organization must be well trained and supported. Career counselling is best delivered in an environment that pays attention to the career development needs of its staff. A balance between staff and organizational needs is needed, just as is a balance between client expectations and organizational capabilities. Tools to assist in identifying staff development requirements and options for achieving those requirements are provided for support staff, for counsellors, and for supervisors and managers.

Some Outcomes of Using the Policy Workbook


Action Plan
SERVICE POLICY DISCUSSIONS
Coherent set of policy statements on career counselling services
Action Plan
to IMPROVE SERVICE QUALITY
Strategic plans for addressing problem areas
Action Plan
STAFF DEVELOPMENT PLANNING
Strategic plans for ongoing professional development

Overview of Part One on Policy Development Planning

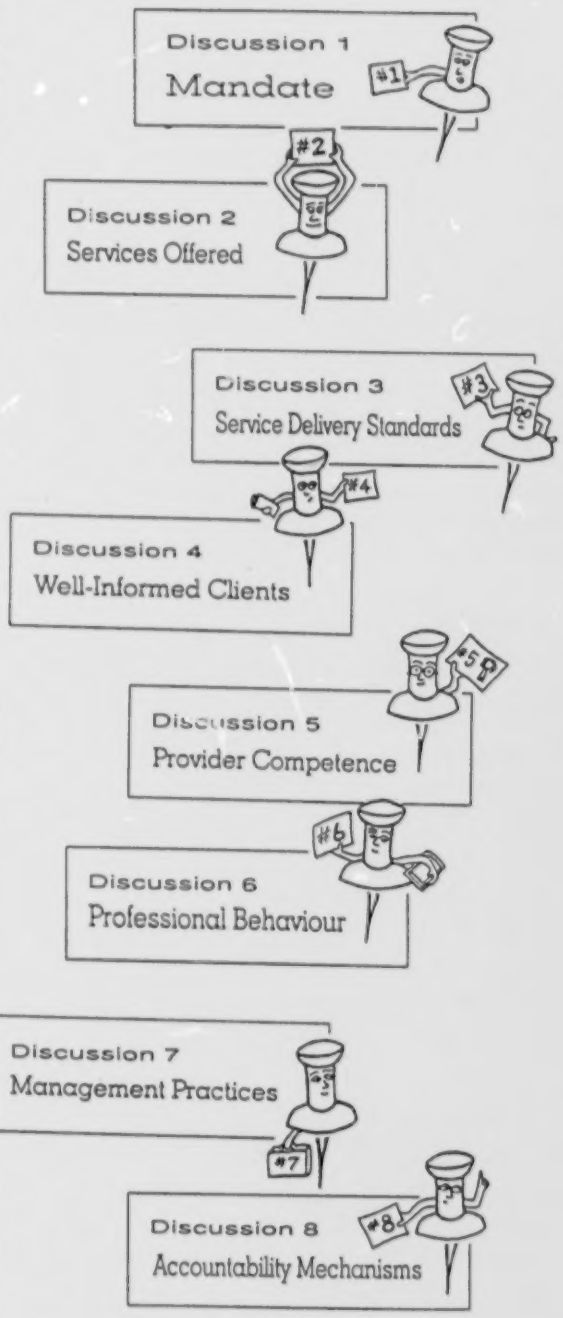
Because many providers have not had the opportunity to develop career counselling policies, Part One of the Workbook has been designed with a step-by-step process for involving you and your staff in:

- Identifying what explicit or de facto policies now exist
- Assessing the adequacy of those policies
- Determining what additional policies are needed to ensure quality service
- Analyzing how well existing practices meet policy standards
- Priorizing the gaps between actual and desired practices
- Strategizing for how to address the high-priority gaps

The policy planning process is designed to take a maximum of 5 hours and covers the following policy areas:

#1 Who Are Your Clients, and What Are Their Needs?
#2 Services Provided
#3 Service Delivery Standards
#4 Well-Informed Clients
#5 Provider Competence
#6 Professional Behaviour
#7 Management Practices
#8 Accountability Mechanisms

At the end of this process, you will have the draft of a coherent set of policy statements, plus strategic plans for addressing problem areas.



To supplement the policy process work, specific reference material is provided as inserts. In Chapter 3, three sets of principles are presented for your consideration as part of the policy development process:

	Page
• Service Quality Standards	*3-17*
• Standards of Professional Conduct	*3-32/3-33*
• Management Principles	*3-36*

Investing the time in developing a set of clear policy statements can have benefits not only for your organization but also for your clients, providers, and funders as outlined below:

Benefits for Delivery Agencies

As the channels for service provision, delivery agencies and institutions are responsible for assessing and assigning priorities for addressing recipient needs in the context of their mandate and available resources. For delivery agencies, policy statements can:

- Specify important areas of quality assurance and performance that facilitate more effective career development, and hence more effective evaluation of services provided and outcomes achieved.

- Outline acceptable structures, budgeting, and staffing patterns in facilities offering career counselling services as well as guide the organization of career counselling service units.

- Establish a more effective and consistent basis for evaluating the performance of individual service providers and provide a common basis for peer review of career counsellors' performance.

Benefits for Providers and Professional Associations

Providers are the persons responsible for the career counselling services themselves, while professional associations play a key role in ensuring professional development opportunities for providers and enhancing the standards of practice for career counselling. For

providers and professional associations, policy statements can:

- Establish standards of practice for providers of career counselling services.
- Articulate performance expectations and commitments to professional development for providers of career counselling services.
- Clarify needs for future education and training of both professional and support personnel in career counselling.
- Identify the types of professional development activities most appropriate to provide.
- Provide the foundation for designing formal university degree programs in career counselling.
- Form the basis for provincial approval of training programs in career counselling and the eventual development of accreditation procedures for facilities and practitioners providing career counselling services.
- Facilitate the development of a model set of policies and principles related to the provision of career counselling services.
- Provide an explicit basis for professional association advocacy of career counsellors in relation to their employers.

Benefits for Clients

Clients are the recipients or end-users of career counselling services and, as such, are concerned with whether or not the services available will meet their needs adequately. For clients, policy statements can:

- Form a foundation for mutual understanding between practitioners/deliverers and service recipients.
- Explain the purpose of career counselling and clarify what outcomes clients can realistically expect.

Benefits for Third-Party Funders

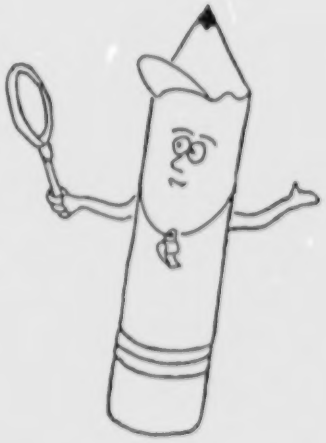
Funders establish mandates for providers of career counselling

services and work to ensure the most effective use of the resources available. For funders, policy statements can:

- Specify important areas of quality assurance and performance that promote more effective career development.
- Facilitate more effective evaluation of services provided and outcomes achieved.
- Shape uniform expectations by provincial ministries of education or other social services, school boards, social agencies, and similar agencies concerned with the provision of career counselling services.

Overview of Part Two on Staff Development Planning

Chapters 4 and 5 of the Workbook help you address staff development in a context of ongoing career development and life-long learning. All too often staff of career counselling services are pressured by work demands and do not have the opportunity to apply to themselves the principles of career development with which they are assisting clients.



Investing time and resources in ongoing staff development is critical to the delivery of quality career counselling services because it is your staff and their skills sets that will determine service quality. Chapter 4 helps you evaluate your present human resource planning process.

One of the barriers to effective staff development for many agencies has been the lack of a clear conceptual model for what "continuous career development" would mean in a pragmatic sense. Chapter 5 will provide you with the following:

- A brief framework for human resource planning in general, positioning staff development planning within that process
- A model for addressing three categories of skill development — technical skill development/remediation, technical skill enhancement, and interpersonal skill enhancement

- Specific procedures for analyzing gaps between organizational needs and present staff skill levels for support staff, counsellors, and supervisors/managers

- Specific procedures for analyzing the adequacy of supervision provided for support staff, counsellors, and supervisors themselves

- Specific procedures for priorizing training and development needs of staff at each level on an ongoing basis

How to Use This Workbook

This *Policy Workbook* is intended to be used primarily by agencies responsible for delivering career counselling services. The process components of this Workbook are presented in five parts, keeping in mind the time constraints faced by most delivery agencies:

Part One — POLICY DEVELOPMENT PLANNING

Chapter 2: Policy Self-Assessment
Time required: 60 minutes
Staff involved: Executive Committee or all staff

Chapter 3: Policy Statement Development
Time required: 5 hours maximum if all eight discussions are completed [30-60 minutes per discussion]
Staff involved: All staff

Part Two — STAFF DEVELOPMENT PLANNING

Chapter 4: Human Resource Planning Self-Assessment
Time required: 20 minutes
Staff involved: Executive Committee or all staff

Chapter 5: Human Resource Plan Development (Section 2)
Time required: 45 minutes
Staff involved: Executive Committee or all staff

Chapter 5: Staff Development Planning (Sections 3-5)
Time required: 30 minutes per staff person
Staff involved: All staff

As you work with the material provided, please keep in mind what we know about ensuring quality service:

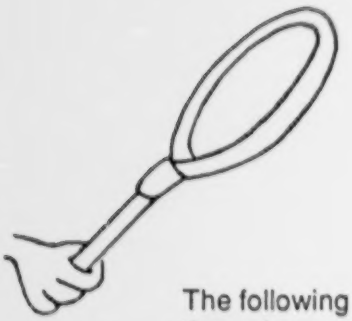
- The quality of a service is directly linked to how satisfied the client is with the service received — so the client plays a major evaluative role in assessing quality.
- Client satisfaction is directly linked to how good the match is between what they expected to receive by way of service and what they actually experienced — so managing client expectations is important.
- There are six factors that have a bearing on client evaluations of service received:
  - ✓ Reliable provider performance
  - ✓ Consistent provider performance
  - ✓ Timeliness of service provision
  - ✓ The degree of respect displayed for clients
  - ✓ The degree to which the expected outcomes are achieved
  - ✓ Back-up systems to ensure ongoing service provision
- Clients *assume* technical competence and evaluate staff on variables that are a combination of careful service delivery process management and interpersonal skills — hence the importance of focusing on both technical and interpersonal skill development.

Part One

POLICY DEVELOPMENT PLANNING

Chapter 2

POLICY SELF-ASSESSMENT



Chapter 2

Policy Self-Assessment

The following series of questions are designed to help you determine the adequacy of your present policies and priorize the types of changes or additions you may wish to make. In Chapter 3, there are structured discussions for each of the eight policy statement areas, which you can use to develop your own policy statement.

We would suggest that you allocate a one-hour staff meeting to reviewing these questions and completing the "Guide for Policy Development Planning" at the end of the chapter.

1. MANDATE

Do you have an explicit "Mandate" statement for career counselling services?

_____ NO
_____ YES

If **YES**:

a) Does your "Mandate" contain a statement about:

Client group(s) served	____ yes	____ no
Primary outcome(s) to achieve	____ yes	____ no
Values guiding service delivery	____ yes	____ no

b) Are you satisfied with your "Mandate" statement:

____ YES, it reflects what we do
____ NO, it needs to be revised to reflect what we do
____ NO, it reflects what we do but could be improved

If you have answered "No" to any of the above, please complete Discussion #1 which should take approximately 60 minutes.

2. SERVICES OFFERED

Do you have an explicit "Services Offered" statement?

_____ NO
_____ YES

If **YES**:

a) Does your "Services Offered" statement include:

A list of your career counselling and related services

____ yes ____ no

Specification of individual, group, or self-service formats

____ yes ____ no

b) Do you have the resources to offer each of the services you have listed under normal circumstances?

____ YES, we do
____ YES, except at peak times
____ NO, we are under-resourced and:
____ we need to reconsider what we can offer
____ we still have to provide all services indicated

c) Do you offer only what your statement suggests?

____ yes ____ no

d) Are you satisfied with your "Services Offered" statement?

____ YES, it is clear and precise about what we deliver
____ NO, it does not reflect the services we deliver
____ NO, while it is clear, it could be improved

If you have answered "No" to any of the above, please complete Discussion #2 which should take approximately 30 minutes.

3. SERVICE DELIVERY STANDARDS

Do you have an explicit "Service Delivery Standards" statement?

_____ NO
_____ YES

If YES:

a) Does your "Service Delivery Standards" statement include what is acceptable in terms of:

Wait time at initial contact	____ yes	____ no
Wait time for appropriate service	____ yes	____ no
Delay in being seen for appointments	____ yes	____ no
Staffing of self-service sections	____ yes	____ no
Maximum case load	____ yes	____ no
Maximum # interviews per client	____ yes	____ no
Average time between sessions	____ yes	____ no
Average length of sessions	____ yes	____ no
Continuity of providers	____ yes	____ no
Coordination of internal services	____ yes	____ no
Coordination of inter-agency services	____ yes	____ no
Follow-up services	____ yes	____ no
Quality of service standards	____ yes	____ no

b) Are you satisfied with your "Service Delivery Standards"?

____ YES, they state exactly what we should provide
____ NO, they are not adequate
____ NO, they are adequate but could be improved

If you have answered "NO" to any of the above, please complete Discussion Session #3 which should take approximately 30 minutes.

4. WELL-INFORMED CLIENTS

Do you have an explicit statement on "Well-Informed Clients"?

_____ NO
_____ YES

If **YES**:

a) Does your "Well-Informed Clients" statement cover:

What information should be provided	___ yes	___ no
To whom information should be provided	___ yes	___ no
How the information should be provided	___ yes	___ no

b) Are you satisfied with your "Well-Informed Clients" statement?

____ YES, it states exactly what we should provide
____ NO, we need to reconsider what is appropriate
____ NO, while it is accurate, it could be improved

If you have answered "NO" to any of the above, please complete Discussion Session #4 which should take approximately 30 minutes.

5. **PROVIDER COMPETENCE**

Do you have an explicit statement on "Provider Competence"?

_____ NO

_____ YES

If YES:

a) Does your "Provider Competence" statement cover:

Type of staff who deliver services	___ yes	___ no
Competence level for service delivered	___ yes	___ no
Supervision standards	___ yes	___ no
Professional development standards	___ yes	___ no

b) Are you satisfied with your "Provider Competence" statement?

____ YES, it describes our requirements accurately

____ NO, it does not describe our competence requirements

____ NO, while it is accurate, we should review it

if you have answered "NO" to any of the above, please complete Discussion Session #5 which should take approximately 30 minutes.

6. PROFESSIONAL BEHAVIOUR

Do you have an explicit statement on "Professional Behaviour"?

_____ NO
_____ YES

If **YES**:

a) Does your "Professional Behaviour" statement include a "Standards of Professional Conduct" that covers:

Legal obligations	___ yes	___ no
Ensuring that services are used properly	___ yes	___ no
Practising only in areas of competence	___ yes	___ no
Obligation to inform clients	___ yes	___ no
Respect for client privacy	___ yes	___ no
Confidentiality	___ yes	___ no
Respect for client integrity and welfare	___ yes	___ no
Cooperative relations with others	___ yes	___ no
Development of professional knowledge	___ yes	___ no
Participation in professional associations	___ yes	___ no

b) Are you satisfied with your "Professional Behaviour" statement?

____ YES, it specifies exactly what is appropriate
____ NO, it is not sufficiently specific
____ NO, it is specific but we need to review it

If you have answered "NO" to any of the above, please complete Discussion Session #6 which should take approximately 30 minutes.

7. MANAGEMENT PRACTICES

Do you have a formal set of "Management Practices"?

_____ NO
_____ YES

If **YES**:

a) Do your "Management Practices" cover:

Procedural guidelines	____ yes	____ no
Action plans	____ yes	____ no
Documentation	____ yes	____ no
Record retention & disposal	____ yes	____ no
Confidentiality of records	____ yes	____ no
Information about related services	____ yes	____ no
Written job descriptions	____ yes	____ no
Performance evaluation standards	____ yes	____ no
Formal performance appraisal	____ yes	____ no

b) Are you satisfied with your "Management Practices" statement?

____ YES, it states exactly how we should manage service delivery
____ NO, while it is accurate, it could be improved
____ NO, we need to reconsider our management practices

If you have answered "NO" to any of the above, please complete Discussion Session #7 which should take approximately 30 minutes.

8. ACCOUNTABILITY MECHANISMS

Do you have an explicit statement on "Accountability Mechanisms"?

_____ NO
_____ YES

If **YES**:

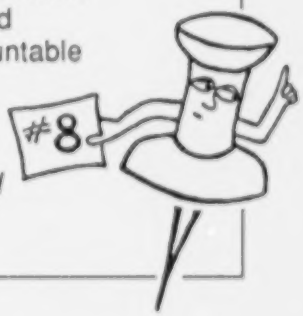
a) Does your "Accountability" statement cover:

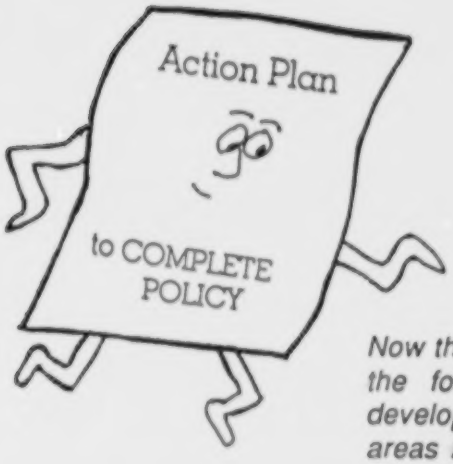
Client feedback on service quality	___ yes	___ no
Client feedback on service standards	___ yes	___ no
Peer review of service delivery	___ yes	___ no
Feedback incorporated in supervision	___ yes	___ no
Staff review of management practices	___ yes	___ no
Formal annual planning exercise	___ yes	___ no

b) Are you satisfied with your "Accountability" statement?

____ YES, it states exactly how we are accountable
____ NO, it is accurate but could be improved
____ NO, it does not state how we are accountable

If you have answered "NO" to any of the above, please complete Discussion Session #8 which should take approximately 30 minutes.





Guide for Policy Development Planning

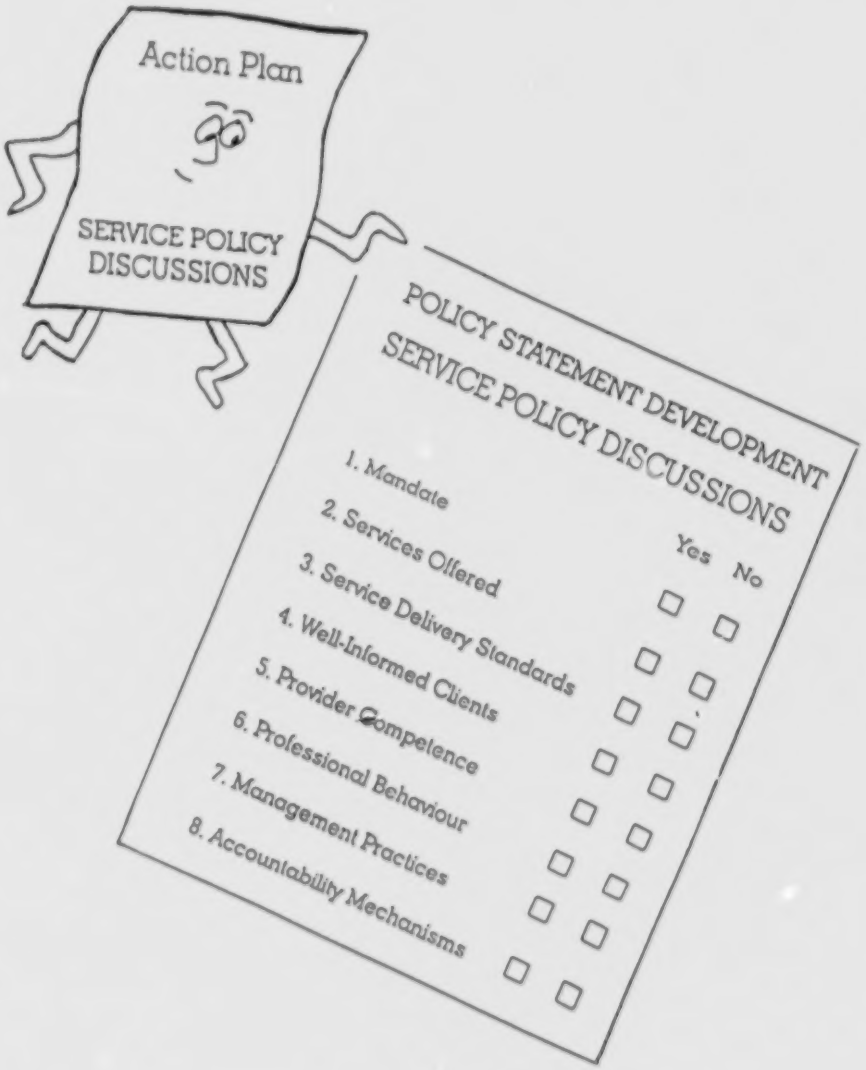
Now that you have completed the "Policy Self-Assessment," the following table can help you plan for any policy development work you have identified. First, indicate which areas need development work. Then, keeping in mind the time requirement, indicate how high its priority is and when you wish to conduct the relevant "discussion" in Chapter 3.

Chapter 3 Discussion	Needed?	Time required	Priority*	Start date
1 Mandate	Y N	60 min.		
2 Services Offered	Y N	30-45 min.		
3 Service Standards	Y N	30-45 min.		
4 Well-Informed Clients	Y N	30 min.		
5 Provider Competence	Y N	40-60 min.		
6 Professional Behaviour	Y N	45-60 min.		
7 Management Practices	Y N	30 min.		
8 Accountability	Y N	30 min.		

* Priority Ratings:
1 = Urgent
2 = Critical, but not urgent
3 = Desirable, but not critical

Chapter 3

POLICY STATEMENT DEVELOPMENT



Chapter 3

Policy Statement Development

This chapter has been organized as a series of eight discussions, each of which will result in a specific policy statement having been developed. If you choose to complete all eight discussions, you will have eight policy statements by the end of the series.

In each discussion, a model policy statement is presented at the beginning to expedite your process, usually with blanks to be completed. Then there are a series of questions or exercises to help you determine the appropriate content for that policy statement. Each discussion also has an indication of the average amount of time you may wish to allocate.

As you work your way through a discussion, it will be important that you distinguish between what you are actually doing, what you would like to do, and what is realistic for you to do. From a quality perspective, it is better to promise what you can always deliver and then exceed clients' expectations some of the time, rather than to promise what you can only deliver some of the time (on "good" days).

To make sure your discussions have a practical outcome, there is a summary planning sheet at the end of the chapter to designate which changes have top priority, who will be responsible for those changes, and the time frame in which the review will take place.

When you have completed your eight policy statements, we would appreciate it if you would share a copy with us at the Canadian Guidance and Counselling Foundation:

Executive Director
Canadian Guidance and Counselling Foundation
202-411 Roosevelt Avenue
Ottawa, Ontario K2A 3X9

Phone: (613) 729-6164
Fax: (613) 729-3515

Discussion 1

Mandate

Discussion #1
[60 minutes]

Mandate
Who Are Your Clients, and What Are Their Needs?

Effective career counselling services need to be grounded in the particular needs of your client group. Your mandate statement sets the stage for designing and evaluating service delivery. The following exercises are designed to help you evaluate and modify your current "Mandate" policy statement or create a "Mandate" statement if you don't already have one.

Policy Statement #1: Mandate

Our mandate is to assist _____ **A** _____ **to**

achieve _____ **B** _____ **in a**

manner that _____ **C** _____.

NOTE: A good mandate statement has the following characteristics:

- *States the overall goal concisely*
- *States the outcomes to be achieved clearly*
- *Indicates the values that are to guide the work*
- *Is specific to your organization*
- *Sets the broad framework, rather than describing tasks*

A. ***Fill in your primary client group.***

To help you in clarifying who you deliver services to, under what conditions, please complete Work Sheet #1-A.

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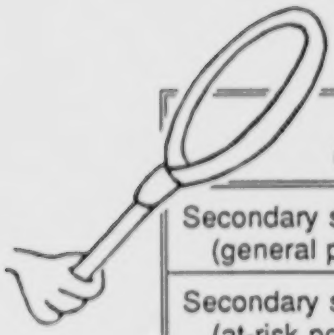


Work Sheet #1-A
Primary Client Groups

Client Groups	% of total clientele
Secondary school youth (general population)	
Secondary school youth (at-risk population)	
College/university students	
Employed adults (advancement/development)	
Unemployed adults	
Adults in transition (retraining)	
Families	
Social assistance recipients	
Special populations: Offenders Physically disabled Other _____	
School systems	
Employers (HRD)	
Insurance companies	
Other: _____	
Total	100%

NOTE: *You may have clientele that fall into several categories, in which case you may either wish to estimate appropriate percentages totalling to 100% or change the total to more than 100%.*

B. ***Fill in which of the outcomes your clients expect to gain from your career counselling services and compare with what outcomes you are prepared to meet.***

Work Sheet #1-B
Expected Client Outcomes

To help you in clarifying clients' usual outcome expectations, rank order the following possible outcomes* in terms of how often your clients come for services expecting that outcome (*1= most often*):

_____ Increased capacity for self-direction
_____ Increased motivation to actively seek work
_____ Increased self-esteem in relation to work
_____ Personal support system identified
_____ Career action plan developed
_____ Clarity about own interests and aptitudes
_____ Clarity about appropriate career choices
_____ Clarity about a career path
_____ Clarity about how best to balance work and leisure
_____ Informed about career options
_____ Informed about jobs available
_____ Aware of how to access labour market information
_____ Equipped with improved job search skills
_____ Equipped with improved work habits
_____ Equipped with a plan for career development
_____ Employed
_____ Accepted in training
_____ Accepted in educational institution
_____ Occupational goals formulated
_____ Understand own employment barriers
_____ Able to reduce or overcome employment barriers
_____ Employment crisis resolution
_____ Other: _____

Does the outcome(s) ranked #1 above match with the primary service you are prepared to deliver? _____ yes _____ no

If **NO**, what changes would be appropriate?

_____

*NOTE: *You may serve more than one type of client and achieve more than one outcome. You may therefore want to complete these charts for each group and complete your own synthesis outcome statement.*

C. ***Fill in the value(s) that you feel should guide your service delivery.***

Here are some possible value statements that you might wish to use:

... communicates respect for the client
... enhances human welfare
... empowers clients to continue their own career development
... respects the social/cultural frame of reference of each client
... recognizes that career development is part of self-development throughout the life span
... respects the uniqueness and integrity of each individual
... respects individual differences
... recognizes that economic/community development depends on human development

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

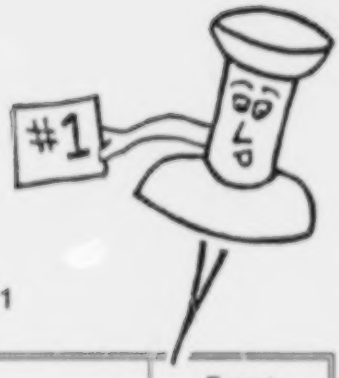
If I am to _____

_____,

then I must _____

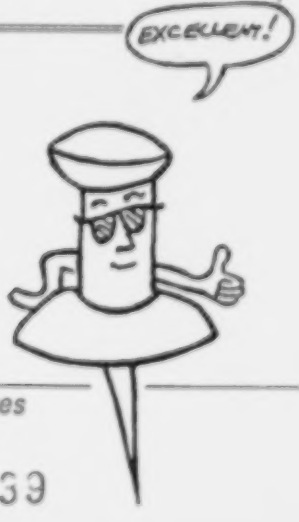
_____

by _____.



Planning Guide for Discussion #1
Policy on Mandate

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			



Discussion 2

Services Offered

Discussion #2
[30 to 45 minutes]

Services* Offered

Clients will be more likely to feel that they have received quality service if they understand what service(s) to expect and if those services match their needs. The following exercises are designed to help you evaluate and modify your current "Services Offered" policy statement or create a "Services Offered" statement if you don't already have one.

Policy Statement #2: Services Offered

> **We offer services to [persons/organization/both persons and organizations]. We offer our clients the following services:**
>
> **_____ A _____**
>
> **Our services are delivered primarily through _____ B _____.**

A. ***Identify the services that you regularly offer.***
To help you in specifying the services you offer both to individuals and to organizations (including your own), please fill in Work Sheet #2-A1 (services for persons) and Work Sheet #2-A2 (services for organizations).

B. ***Identify the modalities that you use to provide services.***
Work Sheets #2-A1 and #2-A2 will also help you identify your usual method of delivery.

* *"Services" is used as a term to include both programs and services.*

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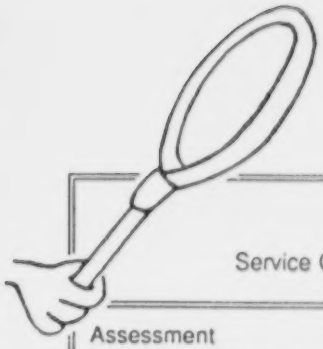
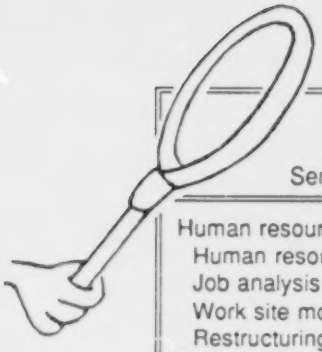


Work Sheet #2-A1
Services Offered to Persons

Service Offered	Offered?	Delivery Method		
		Self-service	Individual	Group
Assessment				
Self-assessment resources	Yes No	____	____	____
Interest/aptitude testing	Yes No	____	____	____
Rehabilitation assessment	Yes No	____	____	____
Counselling/other	Yes No	____	____	____
Information/Occupational Exploration:				
On-site resources				
Take-home resources	Yes No	____	____	____
Computer-assisted systems	Yes No	____	____	____
Job simulations	Yes No	____	____	____
Job shadowing/site visits	Yes No	____	____	____
Other	Yes No	____	____	____
	Yes No	____	____	____
Skill Acquisition Programs:				
Pre-employment/life skills	Yes No	____	____	____
Job search skills	Yes No	____	____	____
Job maintenance skills	Yes No	____	____	____
Transition skills	Yes No	____	____	____
Career planning	Yes No	____	____	____
Intervention:				
Career counselling	Yes No	____	____	____
Peer career counselling	Yes No	____	____	____
Support groups/networks	Yes No	____	____	____
Client advocacy	Yes No	____	____	____
Teaching:				
Career/life curriculum	Yes No	____	____	____
Personal development programs	Yes No	____	____	____



Work Sheet #2-A2
Services Offered to Organizations

Service Offered	Offered?	Offered to:		
		Employers	Families	Communities
Human resources:				
Human resource planning	Yes No	____	____	____
Job analysis	Yes No	____	____	____
Work site modification	Yes No	____	____	____
Restructuring expertise	Yes No	____	____	____
Referrals of clients to:				
Employers	Yes No	____	____	____
Agency partners	Yes No	____	____	____
Training institutions	Yes No	____	____	____
Educational institutions	Yes No	____	____	____
Outplacement services	Yes No	____	____	____
Job placement services	Yes No	____	____	____
Client advocacy:				
Internal service coordination	Yes No	____	____	____
Inter-agency coordination	Yes No	____	____	____
Developmental services:				
Curriculum development	Yes No	____	____	____
Program development	Yes No	____	____	____
New services design	Yes No	____	____	____
Other services:				
Supervising career counselling	Yes No	____	____	____
Resource materials acquisition	Yes No	____	____	____
Other: _____	Yes No	____	____	____

C. **Do the services you deliver match the outcomes desired by clients you identified in Discussion #1 *(Work Sheet #1-B)*?**

- List the services in which the match with outcomes could be improved: _____

_____

_____

- In what ways could you improve the match?

_____

_____

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____

_____,

then I must _____

_____

by _____.

Planning Guide for Discussion #2
Policy on Services Offered

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

I'M HOME DEAR, FROM A HARD DAY OF POLICY-MAKING!
GREAT, MOM! YOU'LL BE GLAD TO KNOW I ALREADY HAVE THE DINNER ON.
WHAT A RESPONSIBLE, MAGNIFICENT CHILD!
A LOT LIKE ME REALLY...

Discussion 3

Service Delivery Standards

Discussion #3
[30 to 45 minutes]

Service Delivery Standards

One of the keys to ensuring quality service is to specify explicit behavioural standards to be met by staff and then make sure that the resources are available for staff to meet those standards. The following exercises are designed to help you evaluate and modify your current "Service Delivery Standards" policy statement or create a "Service Delivery Standards" statement if you don't already have one.

Policy Statement #3: Service Delivery Standards

We adhere to the following service delivery standards in delivering services to our clientele:

Clients can receive information on services available and arrange to receive services by phone/walk-in between ____ am and ___ pm on ___A___. When clients walk in, they can expect to be helped within _____ minutes by ___B___. When clients phone in, the phone is always answered by the ___ ring.

Clients can expect to wait no longer than ____ days to receive services or begin a program/course. When clients arrive for scheduled appointments*, they can expect the intervention to begin within ___ minutes of the scheduled time. (continued)

* *Includes the wait time to start a training course*

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When career counselling services are delivered over several sessions, our clients can usually expect to see the same provider each time. When several different types of career counselling services are to be delivered, the coordination of those different services is typically provided by _____C_____ so that the client receives an integrated service.

In order to ensure quality service delivery, we expect all staff to adhere to our "Service Quality Standards," and we ensure that no provider has a caseload* of more than _____. We ensure continuous availability of service during our office hours by __D___.

* *Caseload includes number of programs or classes, group sessions etc.*

A. *Fill in the days of the week that your office is open or your phone is answered.*

B. *Fill in the type of person from whom clients can expect to receive initial assistance.*

C. *Fill in who is expected to provide coordination among services — the client? the provider? an external party?*

D. *Fill in the method that you use for back-up (e.g., for providing phone coverage when someone is away from their desk).*

Fill in specifics for the other blanks with regard to service standards, using the "Service Quality Standards in Table 3.1 as a guide.

Table 3.1
Service Quality Standards

As providers of career counselling services, we will make every effort to ensure that:

a) our services are accessible to members of the communities being served.
b) the career information we deliver is accurate.
c) our services are delivered in a manner that supports long-term labour market self-sufficiency for the client with regard to career planning and job search skills.
d) the client experiences a continuity of service even if our staff change.
e) our services are appropriate to the age and level of functioning of the client.
f) services are based on and tailored to unique client needs.
g) sufficient and current materials are available to support independent client efforts.
h) networks are in place so that referrals are timely and appropriate to client need.
i) programs are updated regularly in order to remain current with labour market realities.
j) outcomes are analyzed and evaluated regularly.

Our career counselling services will be delivered in a manner that conveys:

a) respect for the dignity of each client.
b) sensitivity to a diversity of cultural values.
c) acknowledgement of contextual issues, especially those underlying systemic discrimination.
d) advocacy for our clients, especially those who are disadvantaged.
e) gender neutrality in choice of vocabulary and imagery.

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____

_____,

then I must _____

_____

by _____.

Planning Guide for Discussion #3
Policy on Service Standards

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Discussion 4

Well-Informed Clients

Discussion #4
[30 minutes]

Well-Informed Clients

Making sure that clients are adequately informed about the services you deliver, as well as complementary services delivered by other agencies, is another key tc quality service. One of the most common sources of client dissatisfaction stems from unrealistic expectations. The following exercises are designed to help you evaluate and modify your current "Well-Informed Clients" policy statement or create an "Well-Informed Clients" statement if you don't already have one.

Policy Statement #4: Well-Informed Clients

In order to ensure appropriate and realistic client expectations, we deliver _____ A _____ information to _____ B _____ via _____ C _____. In the case of mandatory services, we provide clients with ____ _____ D _____.

A. ***Fill in the types of information that you provide.***

To help you in specifying the types of information, please fill in Work Sheet #4-1.

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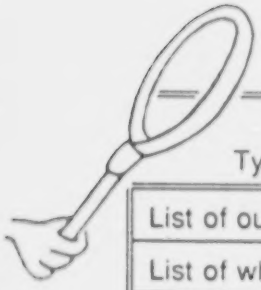

Work Sheet #4-1
Types of Service Information We Deliver

Type of Information	Provided at present?	If NO, should we provide?
List of our services	Yes No	
List of what we don't provide	Yes No	
Alternate service sources	Yes No	
Related services provided in community	Yes No	
List of types of clients we serve	Yes No	
Our phone number	Yes No	
Location of our office	Yes No	
Hours we are open	Yes No	
List of our providers	Yes No	
List of our providers' credentials	Yes No	

B. ***Fill in to whom you provide the information,*** **for example:**

____ Potential clients
____ Families of potential clients
____ Referral agencies
____ Community at large

Are there others to whom you should provide the information?
____yes ____no

If **YES**, who: _____

C. ***Fill in how you provide the information*, for example:**

____ Distributed leaflets
____ Leaflets at your office
____ Poster at your office
____ Public service announcements

Are there other ways you could provide the information?
____ yes ____no

If **YES**, what ways: _____

D. ***If your services are mandatory*, it is still useful to deliver basic information in order to help secure the client's voluntary cooperation. For example, you might provide a standard verbal explanation at the start of service provision, or a written explanation that can be shared with the client's family.**

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____

_____,

then I must _____

_____

by _____.

Planning Guide for Discussion #4
Policy for Well-Informed Clients

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Discussion 5

Provider Competence

Discussion #5
[40 to 60 minutes]

Provider Competence

Quality career counselling services depend upon competent providers, yet the definition of "competence" in career counselling is still unclear. It is important that you determine what the appropriate competence level is for ensuring quality service in your setting and what steps you may need to take in order to meet that policy goal. The following exercises are designed to help you evaluate and modify your current "Provider Competence" policy statement or create a "Provider Competence" statement if you don't already have one.

Policy Statement #5: Provider Competence

Our career counselling services are delivered by __A__ who have __B__ training in career counselling. We ensure that all career counselling services are delivered by persons who receive a minimum of __C__ supervision from a person with career counselling expertise. We also ensure that providers participate in a minimum of __D__ days of professional development each year.

NOTE: If you do not already have a well-developed human resource plan, we suggest that you answer the following questions before addressing this policy statement per se (or complete the work in Chapter 5 on Staff Development Planning):

1. *What types of services are delivered by specific positions in your organization?*

2. *What specific competencies are needed for each of the services delivered?*

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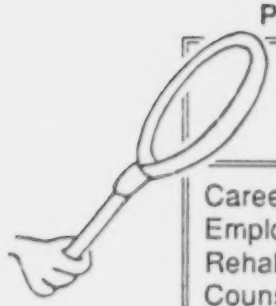
A. ***Fill in the types of staff who deliver career counselling services.***

To help you in identifying the range of staff that may be involved in providing career counselling services, please fill in Work Sheet 5-A below.

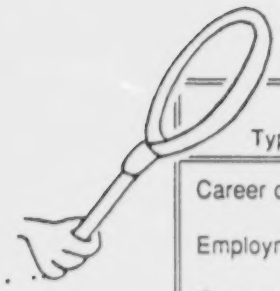
Work Sheet 5-A
Percent of Service Delivered by Each Type of Staff



Type of Staff	Number of Staff by Service	Percent of Service Delivered
Career counsellor	___	___ %
Employment counsellor	___	___ %
Rehabilitation counsellor	___	___ %
Counsellor (general)	___	___ %
Counselling assistant	___	___ %
Teacher	___	___ %
Social Worker	___	___ %
Psychologist	___	___ %
Other _____	___	___ %
Total	___	100 %

B. ***Fill in the types of training that your career counselling staff have.***

To help you match your staff with the types of training they have, please fill in the initials of each of your staff in the appropriate column in Work Sheet 5-B.



Work Sheet 5-B
Career Counselling Staff by Type of Training

Type of Program	Certificate	Diploma	Undergrad degree	Graduate degree	Total staff
Career counselling	—	—	—	—	—
Employment counselling	—	—	—	—	—
General counselling	—	—	—	—	—
Vocational rehabilitation	—	—	—	—	—
Social work	—	—	—	—	—
Community service	—	—	—	—	—
Education	—	—	—	—	—
Psychology	—	—	—	—	—
Sociology	—	—	—	—	—
Other: _____	—	—	—	—	—
Total staff	—	—	—	—	—

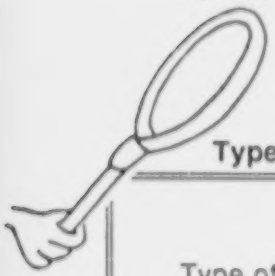
After reviewing Work Sheet 5-B, what do you believe are realistic training standards for your staff who deliver career counselling services?

Minimum training: _____

Desired training: _____

C. ***Fill in the nature and extent of supervision that staff receive on a regular basis.***

To help you specify the amount of supervision received, please fill in Work Sheet 5-C below.



Work Sheet 5-C
Types of Supervision Received by Career Counselling Staff

Type of supervision	Scheduled at least:			Not scheduled:	
	Once a week	Once a month	Once a year	As needed	Not done
Self-assessment					
Supervisor review: Client work Administrative issues Case files	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____
Peer review					
Expert review procedures					
Case conferencing					
Group presentations					
Group problem-solving					
Coaching					
Identify skills to develop					
Update on career tools					
Update on labour market information					
Other: _____					

D. ***Fill in the minimum number of days set aside each year for the professional development of your career counselling staff.***

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____

_____,

then I must _____

_____

by _____.

Planning Guide for Discussion #5
Policy on Provider Competence

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Discussion 6
Professional Behaviour

Discussion #6
[45 to 60 minutes]

Professional Behaviour

The degree of professionalism of providers of career counselling services is another determinant of quality service. The following exercises are designed to help you evaluate and modify your current "Professional Behaviour" policy statement or create a "Professional Behaviour" statement if you don't already have one.

Policy Statement #6: Professional Behaviour

> **We expect all staff involved in providing career counselling services to engage in ongoing professional development and to adhere to our "Standards of Professional Conduct", and we support them in doing so through _____A_____.**

A. Indicate in which of the following ways you support staff professional development:

1. **Do you have a staff development plan for each provider of career counselling services?**
   - _____ NO (see Chapter 5)
   - _____ YES, and it covers:
     - ____ the current year
     - ____ three years
     - ____ five years

2. **In addition to <u>paid</u> professional development days, do you also pay for:**
   - _____ training/conference fees
   - _____ expenses
   - _____ both

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B. **If you do not already have "Standards of Professional Conduct," review the ones in Table 3.2. Do you wish to adopt the statements verbatim? modify existing statements? add or delete statements?**

Table 3.2
Standards of Professional Conduct

Providers of career counselling services are expected to:

1. Support the legal and civil rights of their clients.

2. Conform to relevant statutes established by federal, provincial, and local governments.

3. Accept responsibility for the consequences of their actions and make every effort to ensure that their services are used appropriately.

4. Be respectful of culturally diverse values and supportive of women and men entering non-traditional careers.

5. Limit their practice to their demonstrated areas of professional competence and maintain current knowledge of scientific and professional developments to preserve and enhance their professional competence. Professional counsellors who wish to qualify as providers of career counselling services undertake to obtain formal training in career counselling techniques.

6. Only use testing and assessment tools in which they have been adequately trained and act to ensure that results are interpreted accurately.

7. Fully inform clients as to the purpose and nature of any evaluative, educational, counselling, or training procedures.

8. Respect the right to privacy of the clients to whom they deliver services and safeguard the confidentiality of information obtained in the process of providing career counselling services.

9. Respect the integrity and protect the welfare of the clients to whom they deliver services. If potential conflicts of interest arise, providers clarify the nature and direction of their loyalties and responsibilities and keep all parties informed of their commitments.

(continued)

Table 3.2 (continued)

10. Maintain a cooperative relationship with colleagues and co-workers in the best interest of the client.

11. Acknowledge a responsibility to assist in the development of professional knowledge and communicate that information through publications or other appropriate fora.

12. Pursue their activities as members of the independent, autonomous profession of counselling and are encouraged to participate in the appropriate professional associations.

Adapted from the American Psychological Association's Code of Professional Conduct.

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____

_____,

then I must _____

_____

by _____.

Planning Guide For Discussion #6
Policy on Professional Behaviour

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Discussion 7
Management Practices

Discussion #7
[30 minutes]

Management Practices

When more than one person is involved in providing or overseeing career counselling services, it is important to make managerial principles and procedures explicit to ensure consistency. The following exercises are designed to help you evaluate and modify your current "Management Practices" policy statement or create a "Management Practices" statement if you don't already have one.

Policy Statement #7: Management Practices

> **We have a set of written management principles, plus an annual service provision plan linked to our annual budget, both of which are developed through our annual career counselling services planning exercise.**

A. Do you have an annual career counselling services planning process in which providers participate?

_____ NO
_____ YES

If **YES**, does it include the review of resource adequacy for:

_____ person years to deliver the services designated
_____ career counselling tools
_____ career planning/information materials
_____ information technology

If **NO**, what steps would you need to take in order to institute an annual planning and review process covering each of the issues listed in Table 3.3:

_____

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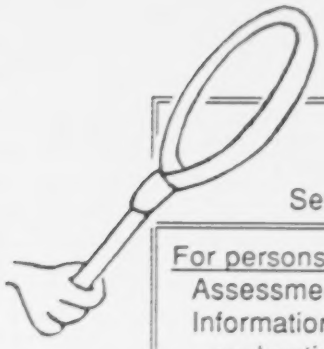
B. **Review the "Management Principles" in Table 3.3. Do you wish to adopt them verbatim? modify existing statements? add or delete statements?**

Table 3.3
Management Principles

1.	To ensure consistency and comprehensiveness of services, providers deliver career counselling services in accordance with explicit procedural guidelines (to be adapted to client needs as appropriate).
2.	Providers develop action plans for client services appropriate to the problems presented by the clients, in conjunction with the client.
3.	Providers maintain accurate, current, and pertinent documentation of essential career counselling services delivered.
4.	Providers and their staff follow an established record retention and disposition policy.
5.	Providers and their staff maintain a system to protect the confidentiality of their records.
6.	Providers and their staff review and revise existing programs as a regular practice.
7.	Providers inform themselves about and use the network of human services in their communities in order to link clients with relevant services and resources.
8.	Providers receive written job descriptions specifying the basis on which their performance will be evaluated.
9.	Providers have the opportunity for formal performance appraisal at least once a year.

Adapted from the American Psychological Association's Code of Professional Conduct.

C. **To help ensure that you have adequate resourcing for each of the services you deliver, please fill in Work Sheet #7 for each of the services you designated in Work Sheet #2-A.**



Work Sheet #7
Resourcing Levels

Service Offered	Annual Review?	Resourcing?	
		Adequate	Inadequate
For persons:			
Assessment	Yes No	___	___
Information/occupational exploration	Yes No	___	___
Skill acquisition programs	Yes No	___	___
Intervention/counselling	Yes No	___	___
Teaching	Yes No	___	___
Other _____	Yes No	___	___
For organizations:			
Human resource services	Yes No	___	___
Referrals	Yes No	___	___
Client advocacy	Yes No	___	___
Developmental services	Yes No	___	___
Supervising career counselling	Yes No	___	___
Resource materials acquisition	Yes No	___	___
Other _____	Yes No	___	___

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____,

then I must _____

by _____.

Planning Guide for Discussion #7
Policy on Management Practices

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Discussion 8

Accountability Mechanisms

Discussion #8
[30 minutes]

Accountability Mechanisms

Being accountable for the consequences of the career counselling services you deliver is an important part of ensuring quality service. Accountability must be linked to explicit performance measures and provides input for the annual planning process. The following exercises are designed to help you evaluate and modify your current "Accountability" policy statement or create an "Accountability" statement if you don't already have one.

Policy Statement #8: Accountability

> **We accept accountability for the quality of career counselling services delivered and evaluate these services regularly against measurable performance criteria at least once a year.**

A. **Which of the following materials do you have available for public review:**

____ Organization chart
____ Performance measures for service delivery
____ Quality of Service Principles
____ Standards of Professional Conduct
____ Management Principles
____ Other: _____

B. **To ensure that you have appropriate mechanisms in place for accountability, please fill in Work Sheet #8.**

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Work Sheet #8
Accountability Mechanisms

Mechanism	Do already	Don't Do Already/ First Step to Implement
Service Quality:		
Client feedback on quality of service	Yes	_____
Client feedback on service standards	Yes	_____
Professional Competence:		
Peer review of service delivery	Yes	_____
Incorporation of feedback in supervision	Yes	_____
Managerial Efficiency:		
Peer review of management practices	Yes	_____
Incorporation of feedback in annual review	Yes	_____

Are there any actions you wish to take to enhance the quality of your services based on the discussion you have just had? If so, please complete the following statement and planning guide:

If I am to _____,

then I must _____

by _____.

Planning Guide for Discussion #8
Policy on Accountability Mechanisms

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

SUMMARY POLICY DEVELOPMENT WORK SHEET

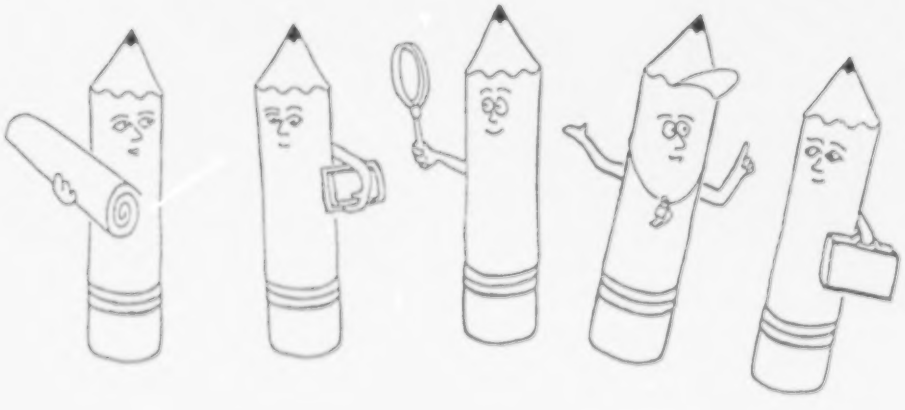
Policy Area	Priority for Action*	Responsible Party
1 - Mandate		
2 - Services Offered		
3 - Service Standards		
4 - Well-Informed Clients		
5 - Provider Competence		
6 - Professional Behaviour		
7 - Management Practices		
8 - Accountability Mechanisms		

* Priority rating:
1 = Within the next month
2 = Within six months
3 = Within the year
4 = Postpone to next year

"Hold that pose!"

Part Two

STAFF DEVELOPMENT PLANNING



Chapter 4

HUMAN RESOURCE PLANNING SELF-ASSESSMENT

Chapter 4

Human Resource Planning Self-Assessment

Ideally, a human resource plan is linked to the organization's mandate and service objectives, the particular services to be provided, and the stated standards for service delivery. These components provide you with the framework for determining the staffing levels and mix of skills needed to provide quality career counselling services. If you do not already have a mandate, a clear list of services provided, and a set of service delivery standards, you can use Discussion #1, #2, and #3 in Chapter 3 to develop them.

In the human resource plan itself, you will need to address staff skill needs in three areas: work task skills remediation (especially as technology changes), enhancement of work task skills in order to advance in the organization, and enhancement of interpersonal skills. As a manager you have three types of responsibilities with regard to human resource planning:

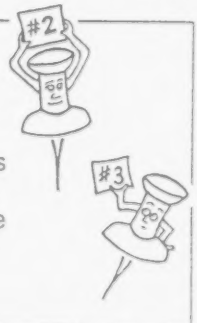
a) managing the planning process itself
b) designing plans for skills development with particular staff
c) designing a plan for your own skills development

The following series of questions are designed to help you, the manager, assess the adequacy of your present human resource planning process and priorize the types of changes or additions you may wish to make. In Chapter 5, there is a structured process for developing a human resource plan, plus staff development planning tools for support staff, for counsellors, and for supervisors and managers.

We would suggest that you allocate a half-hour staff meeting to reviewing these questions and determining what steps you wish to take to enhance your staff development planning.

Note:

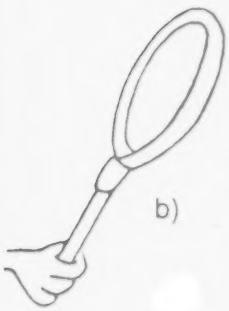
If you do not already have a mandate, a clear list of services provided, and a set of service delivery standards, you can use Discussion #1, #2, and #3 in Chapter 3 to develop them.



1. **Do you have an overall human resource plan?**
____ YES ____ NO

If **YES**:

a) Does your plan indicate the number of staff needed at all levels over at least the next three years in order to provide quality services:



Number of support staff	___ yes	___ no
Number of counselling staff	___ yes	___ no
Number of supervisory staff	___ yes	___ no
Number of management staff	___ yes	___ no

b) Does your plan address staff skill needs of all staff levels in the three critical areas (see Table 4.1):

Work task skills remediation

For support staff	___ yes	___ no
For counsellors	___ yes	___ no
For supervisors	___ yes	___ no
For managers	___ yes	___ no

Work task skills enhancement

For support staff	___ yes	___ no
For counsellors	___ yes	___ no
For supervisors	___ yes	___ no
For managers	___ yes	___ no

Interpersonal skills enhancement

For support staff	___ yes	___ no
For counsellors	___ yes	___ no
For supervisors	___ yes	___ no
For managers	___ yes	___ no

*If you answered "**NO**" to any of the above and you wish to create or modify a human resource plan, then the planning process in Section 5.1 may be useful.*

A cornerstone of human resource planning is comprehensive staff development plans for each member in the organization. The remainder of the self-assessment is designed to assist you in deciding how adequate your present staff development planning process is.

Table 4.1
Types of Skills Development

1. Work task skills remediation

   This most basic category involves identifying any skill deficit staff have with respect to performing their existing jobs well. Staff development planning in this category includes up-skilling to meet technological changes.

2. Work task skills enhancement

   The second category involves identifying which work task skills need to be improved or expanded in order for the staff member to advance in the organization. Staff development planning in this category includes mapping out a career path for the staff member within the organization and making sure that staff members are positioned to change their duties and responsibilities in keeping with advancement opportunities.

3. Interpersonal skills enhancement

   The ability to provide quality service is linked not only to work task competence but also to staff members' ability to interact effectively with others. Staff development planning in this category includes evaluating how well staff are able to listen and communicate effectively, work together as a team, display respect for others, resolve conflict constructively, and so forth.

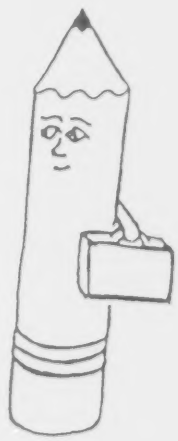
2. **What priority do you presently place on staff development for yourself and your supervisors** (*check one*):

   ____ Top priority
   ____ High priority
   ____ Moderate priority
   ____ Low priority

3. **Are you satisfied with the priority you place on staff development?**

   ____ YES, because _____
   ____ NO, because _____

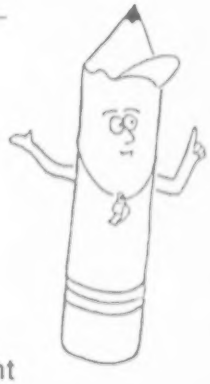
   If **NO**, what step would be necessary to change that priority? _____
   _____



4. **Name two specific ways in which you communicate the priority you place on staff development to your supervisors** (*if applicable*):

a) _____

b) _____



5. **What priority do your supervisors presently place on staff development for your staff** (*check one*):

____ Top priority
____ High priority
____ Moderate priority
____ Low priority
____ Not applicable; no supervisors other than myself

6. **Is the priority your supervisors place on staff development one of the dimensions on which they are evaluated?**

____ NO, staff development is not considered in evaluating supervisors
____ YES, staff development is one responsibility on which they are evaluated

7. **Do you have staff development plans for each of your staff persons, including yourself** (*check all that apply*):

____ **NO**, not for any staff

For support staff	____ yes	____ no [see 5.2]
For counsellors	____ yes	____ no [see 5.3]
For supervisory staff	____ yes	____ no [see 5.4]
For myself as manager	____ yes	____ no [see 5.4]

If NO, why not:

____ Never thought about it
____ Prefer to leave it to each person's own initiative
____ Don't have time
____ Not a part of my role description
____ Don't know how
____ Other: _____

If YES:

a) Are they used for (*check all that apply*):

____ Regular supervisory work
____ Skill development planning
____ Selection of staff development training

____ Job restructuring/job enrichment
____ Job shadowing/cross-training
____ Identifying staff career paths
____ Performance evaluation/review
____ Promotion; merit increases
____ Other: _____

b) By whom are they developed (*check all that apply*):
____ Staff person
____ Supervisor
____ Staff and supervisor in consultation
____ Personnel department/committee
____ Other: _____

c) By whom are they reviewed (*check all that apply*):
____ Staff person
____ Supervisor
____ Staff and supervisor together
____ Personnel department/committee
____ Peer review committee
____ Other: _____

d) How frequently are they reviewed/updated?
____ Monthly
____ Annually
____ Periodically
____ Never

e) Are you satisfied with your staff development planning strategy?
____ YES, it works well for us
____ NO, it is more a paper exercise than a developmental tool
____ NO, it is working o.k. but could be improved

8. **What strategies do you use to involve staff in staff development planning** (*check all that apply*):
____ Staff work with supervisors on staff development planning
____ Staff receive written material on career development strategies
____ Staff receive information on organizational priorities in skills development
____ Staff receive material explaining the role of supervision in

staff development (see Table 4.2)

____ Staff development is discussed at staff meetings

____ Recognition is given for staff involvement in staff development activities

____ Staff are encouraged to bring in a "wish list" for discussion

____ Other:_____

9. **If you completed Discussion #5 in Chapter 3 of this Workbook on "Provider Competence,"** what changes (if any) do you wish to make to enhance staff development based on that work?

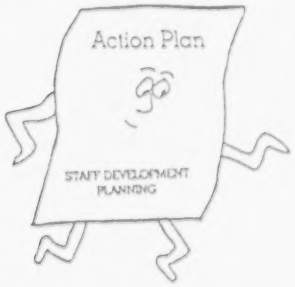
_____

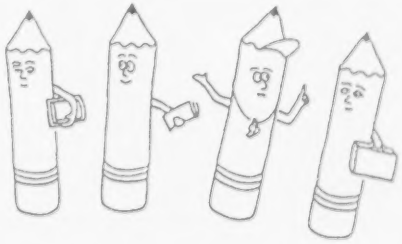
_____

10. **If you completed Discussion #6 in Chapter 3 of this Workbook on "Professional Behaviour,"** what changes (if any) do you wish to make to enhance staff development based on that work?

_____

_____





Based on your answers to all of the questions above, what three steps will you take to enhance staff development?

Step 1: _____

Step 2: _____

Step 3: _____

Guide for Staff Development Planning

Now that you have completed the "Human Resources Planning Self-Assessment," the following table can help you plan for any staff development work you have identified. First, indicate in Column 2 which areas need development work. Then indicate in Column 3 how high its priority is and, in Column 4, when you wish to have it completed.

Chapter 5 Exercise	Needed?	Priority*	Date scheduled
5.1 Human resource plan development	Y N		
5.2 Staff development planning for support staff	Y N		
5.3 Staff development planning for counsellors	Y N		
5.4 Staff development planning for supervisors	Y N		
5.5 Staff development planning for managers	Y N		

Summary of other action decisions:

* Priority Ratings:
1 = Urgent
2 = Critical, but not urgent
3 = Desirable, but not critical

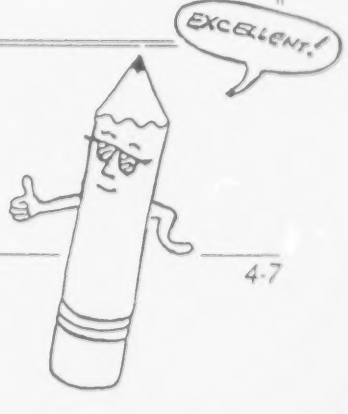
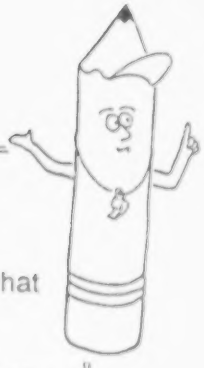


Table 4.2
The Role of the Supervisor



Supervisors play a critical role in ensuring that staff are highly motivated and able to perform efficiently by:

1. Providing clear, written job descriptions so that staff know exactly what is expected of them.

2. Providing structured orientation for new staff or staff being assigned to new tasks to clarify how to do their work.

3. Providing objective, written criteria for promotion so that staff know what they need to do in order to advance in the organization.

4. Showing respect for the experience and knowledge of staff members by soliciting their ideas on how to get the results desired.

5. Meeting regularly with each staff member to review their work and discuss suggestions for improvement in getting the work done well.

6. Modelling good work habits for staff.

7. Assisting each staff member in developing good work habits by using supervisory time and/or staff meeting time to problem-solve difficult situations with staff.

8. Coaching each staff member in trying out new work habits and protecting them from undue criticism while they are practising those new habits.

9. Ensuring that staff have the appropriate authority to perform their responsibilities.

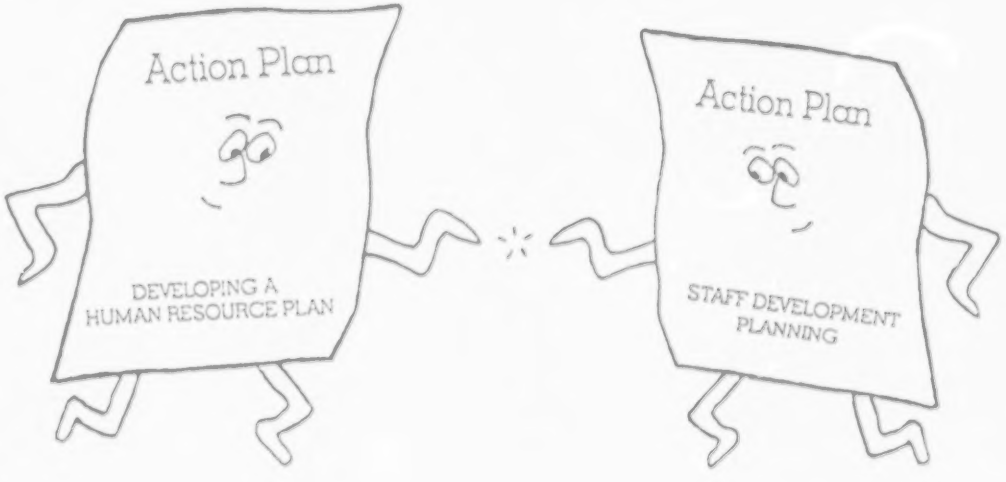
10. Identifying any problems that staff are encountering and intervening with management to ensure that they are resolved.

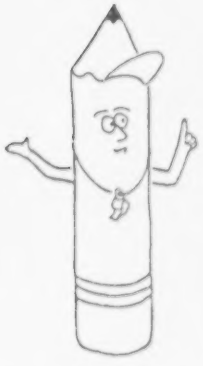
11. Advocating for staff to have new opportunities and sponsoring staff for advancement within the organization.

12. Meeting annually with each staff member to review their status in the organization, set targets for advancement, and identify what kinds of skill training the staff member will need that year.

Chapter 5

STAFF DEVELOPMENT PLANNING





Chapter 5

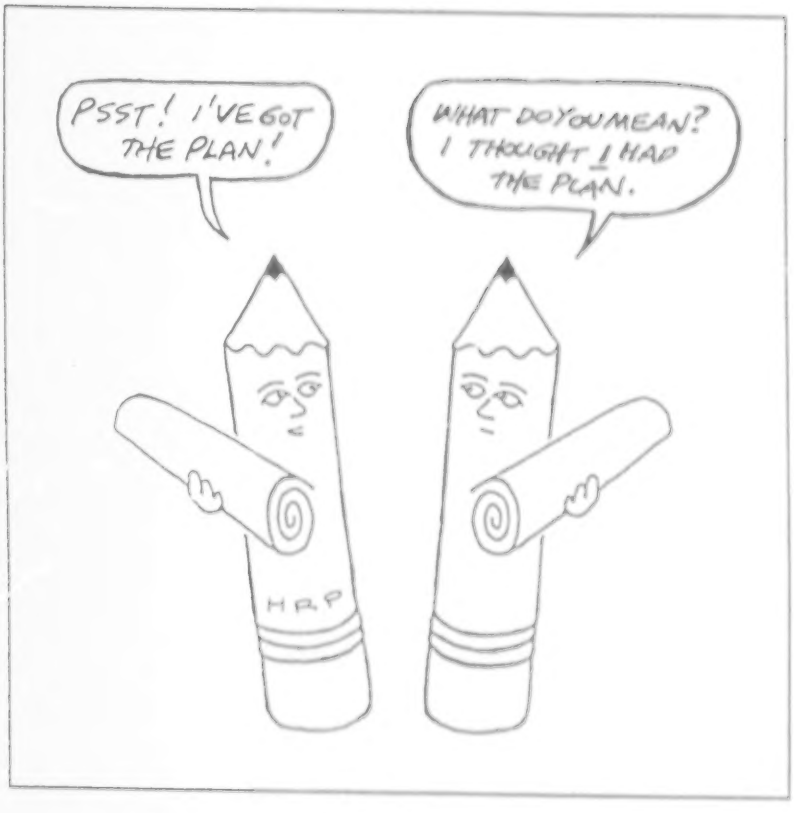
Staff Development Planning

The quality of your career counselling services depends directly upon the professionalism of all of your staff. To be effective, staff need ongoing training and professional development opportunities — what is being referred to as "continuous career development" or lifelong learning."

This chapter will help you make sure that you have the human resource base you need to implement the policy statements you developed in Chapter 3. The material in the chapter is divided into five sections:

Section 5.1:	Developing a human resource plan
Section 5.2:	Staff development planning for support staff
Section 5.3:	Staff development planning for counsellors
Section 5.4:	Staff development planning for supervisors/managers
Section 5.5:	A reference framework for staff development planning

Based on your planning table at the end of Chapter 4, you may choose to use all of the chapter or only parts of it. The reference framework in Section 5.5 is provided for agencies that are new to the process of human resource development and staff development planning. **Please substitute terminology or concepts that are specific to your organization wherever possible so that the material will be as useful as possible.**


PSST! I'VE GOT THE PLAN!
WHAT DO YOU MEAN? I THOUGHT I HAD THE PLAN.
HRP

Developing a HUMAN RESOURCE PLAN

5.1 Developing a Human Resource Plan

The difference between personal career planning and the type of staff development planning addressed in this chapter lies in the attempt to balance individual and organizational needs. Any effective human resource development with staff will need to be based on a human resource plan for the organization as a whole, and this section provides a step-by-step approach to actually developing a plan if you don't have one already (or if you want to revise the one you have).

1. **What is the minimal number of staff in each position that you need to implement your policy statements?** (See particularly Discussion #1 — your organization's "Mandate," Discussion #2 — the "Services Offered," and Discussion #3 — your "Service Delivery Standards.")

	This Year	In 3 Years
Support staff	_____	_____
Staff counsellors	_____	_____
Supervisors	_____	_____

2. **Identify the skill sets needed by your staff in order to provide quality service as per your Mandate.**

   a) Based on your "Services Offered" (Discussion #2) and "Service Delivery Standards" (Discussion #3), what work task skills do your support staff need to have (*check all that apply*):

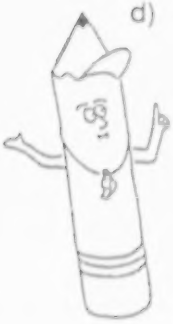
	All Staff	Selected Staff Only
Accounting	_____	_____
Administrative file management	_____	_____
Client case file management	_____	_____
Computer skills	_____	_____
Correspondence	_____	_____
Crisis management	_____	_____
Linguistic capabilities	_____	_____
Literacy/numeracy	_____	_____
Quality control	_____	_____
Self-assessment	_____	_____
Scheduling of appointments	_____	_____
Time management	_____	_____
Other: _____	_____	_____

b) Based on your "Services Offered" (Discussion #2), what work task skills do your counsellors need to have (*check all that apply*):

	All Counsellors	Selected Counsellors
Individual counselling	____	____
Group counselling	____	____
Assessment	____	____
Staff information/resources	____	____
Labour market information	____	____
Organizational consultation	____	____
Program delivery	____	____
Other: _____	____	____

c) Based on your organizational structure, what work task skills do you and your supervisors need to have (*check all that apply*):

Knowledge of technical skill areas	____
Facility in:	
Communication with staff	____
Skill development with staff	____
Ensuring staff work completion	____
Staff administrative support	____
Other: _____	____



d) What interpersonal skills do all staff need to have (*check all that apply*):

Active listening	____
Change management	____
Leadership	____
Mood management	____
Negotiation skills	____
Problem-solving skills	____
Teamwork	____

3. **Analyze the gaps between organizational needs and present skill levels based on having staff identify the job responsibilities that they have and self-assess their degree of skill:**

For support staff, compare responses in Sections 5.2a and 5.2b
For counsellors, compare responses in Sections 5.3a and 5.3b
For supervisors, compare responses in Sections 5.4a and 5.4b
For managers, compare responses in Sections 5.4a and 5.4b

4. **Review the gap analyses from Step 3, priorize the skill changes needed to "close the gap," and communicate those priorities to staff.**

5. **Solicit career development goals from staff by asking them to project themselves three (3) years into the future.** What changes do they want to have happened in their present job within those three (3) years? Based on staff input and organizational needs, diagram the career path projections for each staff member -- i.e., what form of "advancement" do you forecast (e.g., promotion, job restructuring/enrichment, cross-training, job exchange).

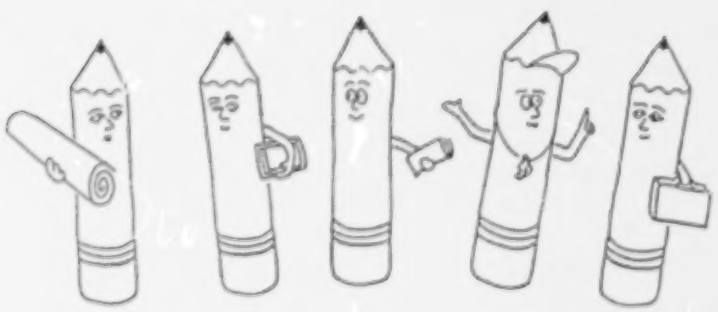
6. **On an annual basis, identify with each staff member the priority staff development activities for them in the three areas of work task skill acquisition, work task skill enhancement, and interpersonal skills enhancement (given present organizational resources):**

   For support staff, see Section 5.2c
   For counsellors, see Section 5.3c
   For supervisors/managers, see Section 5.4c

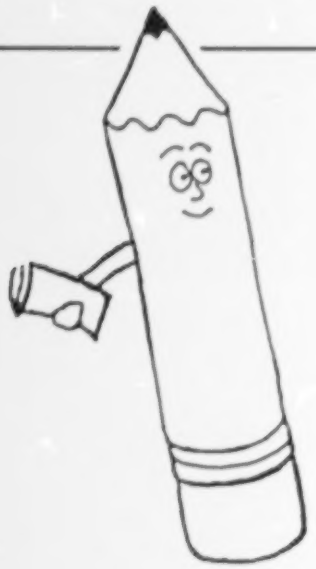
7. **Support staff members in implementing their staff development plans.**

8. **Evaluate the outcome of each staff development activity.**

NOTE: The sections that follow provide material for your staff and yourself to begin work on creating or enhancing your own staff development plans. We would suggest that staff work in groups or individually in conjunction with their supervisor in answering the questions posed.



Staff Development Planning
SUPPORT STAFF



5.2 Staff Development Planning for Support Staff

This section is designed to help you as support staff do staff development planning through three activities:

a) inventorying your present job responsibilities
b) self-assessing your own level of job skills
c) creating a plan for your ongoing staff development

We would encourage you to solicit input from others as you go through the self-assessment process — both supervisors and colleagues -- to assist you in developing a balanced picture of your own strengths and staff development challenges.

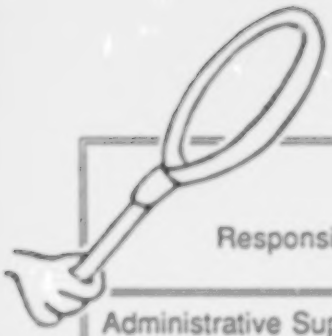
Since resources are not unlimited, it is important that you find out from your supervisor upfront the level of resource support you can expect:

Number of paid staff development days ____ days
Staff development expense budget $ _____

If you believe the resourcing level to be inadequate, you need to resolve this matter with your supervisor before devoting more energy to staff development planning.

5.2a Inventory of Present Job Responsibilities

Please describe, using Work Sheet #5-2a, the job responsibilities you presently have or would like to have. These responsibilities are what make up your job description.



Work Sheet #5-2a
Job Responsibilities That I Have

Responsibilities	Do you have this responsibility?	If "No," do you want to have this responsibility?		
		Yes	Perhaps	No
Administrative Support:				
Accounting	Yes No	____	____	____
Administrative files	Yes No	____	____	____
Client case files	Yes No	____	____	____
Correspondence	Yes No	____	____	____
Data entry/processing	Yes No	____	____	____
Task Management:				
Leadership	Yes No	____	____	____
Negotiation	Yes No	____	____	____
Problem-solving	Yes No	____	____	____
Teamwork	Yes No	____	____	____
Time management	Yes No	____	____	____
Client Interaction:				
Handling crises	Yes No	____	____	____
Help in other languages	Yes No	____	____	____
Scheduling of appointments	Yes No	____	____	____
Quality control:				
Files in order	Yes No	____	____	____
Information kept confidential	Yes No	____	____	____
Timely client service	Yes No	____	____	____
Other:				
	Yes No	____	____	____
	Yes No	____	____	____
	Yes No	____	____	____

NOTE: Any responsibilities that you want to have, but don't have at present, should be noted for the staff development planning you will be doing in Table 5.2d.

5.2b Self-Assessment of Support Staff Skills

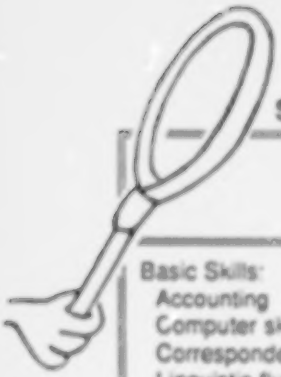
Each of us is better at some parts of our job responsibilities than others. Work Sheet #5-2b asks you to rate your present level of expertise for each type of skill you need to use in your present job. You will be identifying the areas in which your skills are fine and those areas in which you may need or want further skill development. Not all of the skills listed will be of relevance to each of you so the first question posed is whether or not the skill set is relevant to your work.

For each skill that you consider relevant (i.e., that you need to have in order to provide the services for which you are responsible), please rate your skill level using the following 5-point scale:

5 = excellent
4 = very good; very effective in this part of my work
3 = good; acceptable performance but could improve
2 = fair; need to enhance my skills in this area
1 = poor; need to acquire skills in this area

Next, for any skill areas where you would rate yourself as a "3" or lower, please indicate your time priority for addressing this skill area using the two categories:

Now = plan staff development during this year
Later = development planning postponed until next year



Work Sheet #5-2b
Self-Assessment of My Skills as Support Staff

Skill	Is the skill relevant to your job?	Skill Level	Time
Basic Skills:			
Accounting	Yes No	___	Now Later
Computer skills	Yes No	___	Now Later
Correspondence	Yes No	___	Now Later
Linguistic fluency	Yes No	___	Now Later
Literacy	Yes No	___	Now Later
Numeracy	Yes No	___	Now Later
Correspondence	Yes No	___	Now Later
Scheduling of appointments	Yes No	___	Now Later
Self-Management:			
Time management	Yes No	___	Now Later
Mood management	Yes No	___	Now Later
Self-assessment	Yes No	___	Now Later
Problem-Solving:			
Recognizing problems	Yes No	___	Now Later
Seeking information	Yes No	___	Now Later
Seeking assistance	Yes No	___	Now Later
Problem analysis	Yes No	___	Now Later
Problem resolution	Yes No	___	Now Later
Solution assessment	Yes No	___	Now Later
Teamwork:			
Interpersonal communication	Yes No	___	Now Later
Working cooperatively	Yes No	___	Now Later
Avoiding work disruptions	Yes No	___	Now Later
Leadership:			
Responsibility for tasks	Yes No	___	Now Later
Problem prevention	Yes No	___	Now Later
Demonstrating initiative	Yes No	___	Now Later
Quality control:			
Files in order	Yes No	___	Now Later
Information kept confidential	Yes No	___	Now Later
Timely client service	Yes No	___	Now Later
Other skills relevant to your job	Yes No	___	Now Later

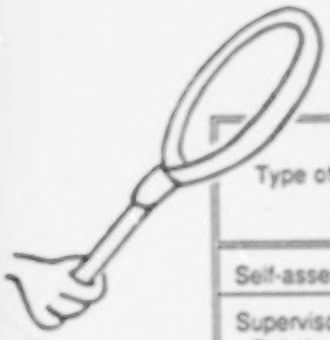
5.2c Staff Development Planning

In planning for your skills development, there are two related but different aspects that you will want to review:

a) the type of ongoing supervision and/or professional coaching that you receive;

b) the specific activities you may wish to build in for gaining new skills or enhancing your present skills.

As a first step, please indicate in Work Sheet #5-2c how often you receive the following types of supervisory assistance, and how frequently you would like to get such help. **If you don't receive a particular type of supervision or don't want to receive it, simply leave the item blank.**



Work Sheet #5-2c
Types of Supervision I Receive and Desire

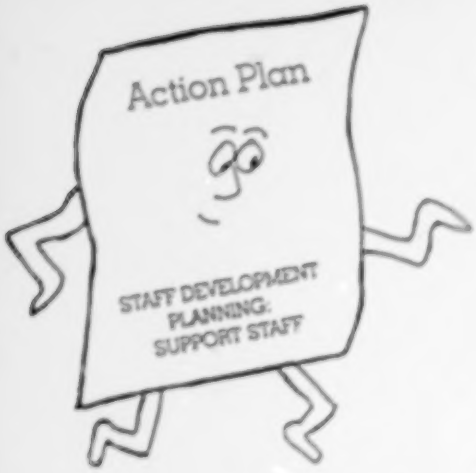
Type of supervision	Present frequency:			Desired frequency:		
	At least once a month	Once a year	Ongoing	Just the same	More often	Less often
Self-assessment						
Supervisor review of: Relations with clients Relations with staff Administrative work	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____
Peer review						
Review by external experts						
Staff meetings						
Coaching						
Performance appraisal						
Other: _____						

Now that you have filled in Work Sheet 5-2c, please note any items where you have indicated that you would like more or less supervision. Then make a note of these items in your staff development planning guide in Work Sheet #5-2d.

The planning guide below in Work Sheet #5-2d has two parts, one for supervisory assistance and the other for specific skills training:

> For Part A, please review your answers in Work Sheet #5-2c and then fill in up to three types of supervisory activities that you would like to have changed.
>
> For Part B-1, please review your answers in Work Sheet #5-2b and pick one of the skills where your skill level was "3" or lower and you had indicated "now" as your time frame. Write in the skill and then, in consultation with your supervisor, fill in how you will get the skill training, what your first step is, when you will start, when you will be finished, and how you will know that your skill level has improved ("success indicator").
>
> For Part B-2, please review your answers in Work Sheets #5-2a and #5-2b and pick an area of skill training that will allow you to assume new job responsibilities in which you are interested.
>
> For Part B-3, please review your answers in Work Sheets #5-2a and #5-2b and select an interpersonal skill that you would like to improve which will help you do your job better.

We recommend that you focus on no more than three skills (one per area) each year in order to avoid overburdening yourself. In planning for staff development, it is best to attempt manageable goals to ensure success.



Work Sheet #5-2d
Planning Guide for Support Staff

Part A: Supervisory Assistance

1. Change desired in supervision _____
   First step? _____
   Starting when? _____

2. Change desired in supervision _____
   First step? _____
   Starting when? _____

3. Change desired in supervision _____
   First step? _____
   Starting when? _____

Part B: Skills Development

1. Work task skill to be acquired _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

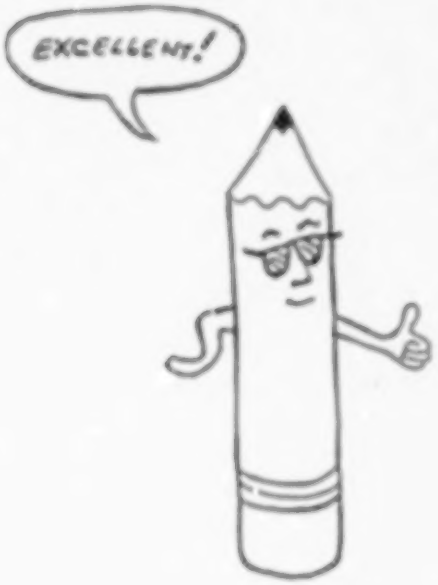
2. Work task skill to be improved _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

3. Interpersonal skill to be improved _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

Now that you have had a chance to create a plan for your own staff development, what additional support do you need from your supervisor or agency in order to implement your plan?

____ Permission to job shadow
____ Permission to cross-train
____ Permission to restructure/enrich my job
____ Work time for self-study
____ Other _____

The quality of career counselling services in Canada depends on each of us investing in staff development. We hope that you will be able to arrange with your agency to receive the support you need to continue to develop your job skills.



Staff Development Planning
COUNSELLORS

5.3 Staff Development Planning for Counsellors

This section is designed to help you as counsellors do staff development planning through three activities:

a) inventorying your present service delivery responsibilities
b) self-assessing your own level of career counselling skills
c) creating a plan for your ongoing staff development

We would encourage you to solicit input from others as you go through the self-assessment process — both supervisors and colleagues -- to assist you in developing a balanced picture of your own strengths and staff development challenges.

Since resources are not unlimited, it is important that you find out from your supervisor upfront the level of resource support you can expect:

Number of paid staff development days ____ days
Staff development expense budget $ _____

If you believe the resourcing level to be inadequate, you need to resolve this matter with your supervisor before devoting more energy to staff development planning.

5.3a Inventory of Present Responsibilities

Please describe, using Work Sheets #5-3a1 and #5-3a2, the service delivery responsibilities that you presently have or would like to have. The services described parallel those in Work Sheets #2-A1 and #2-A2. These responsibilities are what make up your job description, in whole or in part.

Work Sheet #5-3a1
Services I May Offer to Persons

Service Offered	Do you presently offer the service?	If "No," do you want to offer the service?		
		Yes	Perhaps	No
Assessment				
Self-assessment resources	Yes No	____	____	____
Interest/aptitude testing	Yes No	____	____	____
Rehabilitation assessment	Yes No	____	____	____
Counselling/other	Yes No	____	____	____
Information/Occupational Exploration:				
On-site resources	Yes No	____	____	____
Take-home resources	Yes No	____	____	____
Computer-assisted systems	Yes No	____	____	____
Job simulations	Yes No	____	____	____
Job shadowing/site visits	Yes No	____	____	____
Other _____	Yes No	____	____	____
Skill Acquisition Programs:				
Pre-employment/life skills	Yes No	____	____	____
Job search skills	Yes No	____	____	____
Job maintenance skills	Yes No	____	____	____
Transition skills	Yes No	____	____	____
Intervention:				
Career counselling	Yes No	____	____	____
Peer career counselling	Yes No	____	____	____
Support groups/networks	Yes No	____	____	____
Client advocacy	Yes No	____	____	____
Teaching:				
Career/Life curriculum	Yes No	____	____	____
Personal development programs	Yes No	____	____	____
Other services	Yes No	____	____	____

NOTE: Any services that you want to be offering, but don't at present, should be noted for the staff development planning you will be doing in Table 5.3d.

Work Sheet #5-3a2
Services I May Offer to Organizations

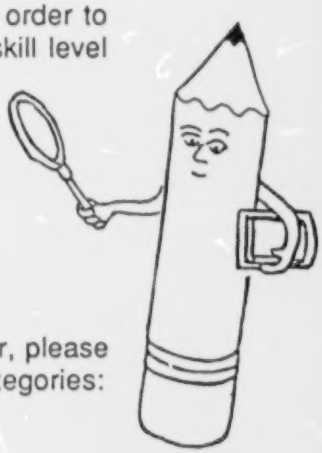
Service Offered	Do you offer the service?	If "No," do you want to offer the service?		
		Yes	Perhaps	No
Human resources:				
Human resource planning	Yes No	____	____	____
Job analysis	Yes No	____	____	____
Work site modification	Yes No	____	____	____
Restructuring expertise	Yes No	____	____	____
Referrals to:				
Employers	Yes No	____	____	____
Community agencies	Yes No	____	____	____
Training institutions	Yes No	____	____	____
Educational institutions	Yes No	____	____	____
Outplacement services	Yes No	____	____	____
Job placement services	Yes No	____	____	____
Client advocacy:				
Internal service coordination	Yes No	____	____	____
Inter-agency coordination	Yes No	____	____	____
Developmental services:				
Curriculum development	Yes No	____	____	____
Program development	Yes No	____	____	____
New services design	Yes No	____	____	____
Other services:				
Supervising career counselling	Yes No	____	____	____
Resource materials acquisition	Yes No	____	____	____
Other: _____	Yes No	____	____	____

NOTE: Any services that you want to be offering, but don't at present, should be noted for the staff development planning you will be doing in Table 5.3d.

5.3b Self-Assessment of Career Counselling Skills

Each of us is better at some parts of our job responsibilities than others. Work Sheet #5-3b asks you to rate your present level of expertise in the career counselling skills you use in your present job. You will be identifying the areas in which your skills are fine as well as those areas in which you may need or want further skill development. Not all of the skills listed will be of relevance to each of you so the first question posed is whether or not the skill set is relevant to your work.

For each skill that you consider relevant (i.e., that you need to have in order to provide the services for which you are responsible), please rate your skill level using the following 5-point scale:



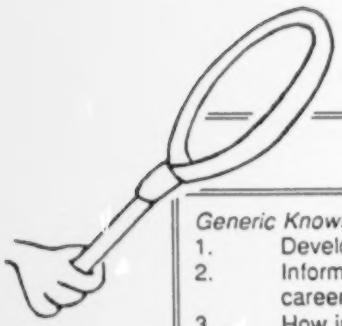
5 = excellent
4 = very good; very effective in this part of my work
3 = good; acceptable performance but could improve
2 = fair; need to enhance my skills in this area
1 = poor; need to acquire skills in this area

Next, for any skill areas where you would rate yourself as a "3" or lower, please indicate your time priority for addressing this skill area using the two categories:

Now = plan staff development during this year
Later = development planning postponed until next year

If you work in an agency setting where skill sets for your work have already been defined, please substitute those skill lists for the ones given in Table 5.3b.

NOTE: Work Sheet #5-3b is designed to be as generic as possible to career counsellors and educators in a wide range of settings. Organizations, ministries, associations may have their own specific skill sets defined. If so, these should be substituted for 5.4b as they will make the exercise more job relevant and personally meaningful to the counsellors completing it.



Work Sheet #5-3b
Self-Assessment of Career Counselling Skills

Counselling Skill	Is skill relevant?	Skill level	Time
Generic Knowledge for Providing Career Counselling:			
1. Developmental issues through the life-span	Yes No	____	Now Later
2. Information, techniques and models related to career planning, career transition and placement	Yes No	____	Now Later
3. How individuals place unnecessary limitations on their career possibilities	Yes No	____	Now Later
4. The influence of values, beliefs, and assumptions on individual career development	Yes No	____	Now Later
5. The influence of culture, ethnicity, gender and age on career choice/planning	Yes No	____	Now Later
6. Theories and models that apply specifically to women's career development	Yes No	____	Now Later
7. How to assist clients in making a connection between values, belief and attitudes, and their career choices	Yes No	____	Now Later
8. How to underscore clients' strengths and abilities by supporting clients in discovering and appreciating their unique qualities	Yes No	____	Now Later
9. How to empower clients to think beyond their present situation and to imagine the future differently	Yes No	____	Now Later
Generic Skills for Delivering Career Counselling:			
1. Establish and maintain productive personal relationships with individuals	Yes No	____	Now Later
2. Use counselling techniques to help individuals:			
• understand their personal characteristics, values and motivations related to career	Yes No	____	Now Later
• problem-solve issues which are interfering or impeding self/career development	Yes No	____	Now Later
• explore their career possibilities	Yes No	____	Now Later
• develop self-directedness and self-management with respect to their career development	Yes No	____	Now Later
• develop career action plans	Yes No	____	Now Later
3. Support, challenge and encourage individuals to take action in the interests of their career development	Yes No	____	Now Later
4. Make appropriate referrals to sources of career development, employment, and training assistance	Yes No	____	Now Later

Counselling Skill	Is skill relevant?	Skill level	Time
Group Counselling Skills:			
1. Establish and maintain a productive group climate	Yes No	____	Now Later
2. Collaboratively establish group goals and norms	Yes No	____	Now Later
3. Model and teach skill building activities in a group setting	Yes No	____	Now Later
4. Select from a repertoire of techniques appropriate to different learning needs and to evolving group needs	Yes No	____	Now Later
5. Manage experiential learning activities in a group setting	Yes No	____	Now Later
Individual/Group Assessment Skills:			
1. Explore and establish career development needs in:			
• Career exploration	Yes No	____	Now Later
• Career paths	Yes No	____	Now Later
• Training choices/Re-training choices	Yes No	____	Now Later
• Education and development choices	Yes No	____	Now Later
• Transition	Yes No	____	Now Later
• Job-search/Job re-entry	Yes No	____	Now Later
• Developmental issues related to career such as self-concept and career maturity, career indecision	Yes No	____	Now Later
• Coping with job loss	Yes No	____	Now Later
2. Use (select, administer, score, interpret) assessment instruments appropriate for specific situations and populations	Yes No	____	Now Later
3. Use a variety of technologies to promote exploration and understanding of self and career	Yes No	____	Now Later
4. Ensure that variables such as culture, learning style, learning difficulties, disabilities are taken into account in the assessment process	Yes No	____	Now Later
5. Select and use appropriate assessment techniques for group and individual use, including computer-assisted resources	Yes No	____	Now Later

Counselling Skill	Is skill relevant?	Skill level	Time
Information Acquisition Skills:			
1. Access appropriate:			
• employment information	Yes No	____	Now Later
• career planning resources	Yes No	____	Now Later
• labour market information	Yes No	____	Now Later
• education and training options and opportunities	Yes No	____	Now Later
2. Network with information sources and resources in the community to ass'st individuals in career/life planning	Yes No	____	Now Later
3. Use, and teach individuals to use, career-related information	Yes No	____	Now Later
4. Organize activities and learning experiences to assist individuals to be informed about career options (for example, job site visits, computer-based information systems, job shadowing)	Yes No	____	Now Later
Program Delivery			
Demonstrate the ability to:			
1. Utilize needs assessment and evaluation techniques and practices	Yes No	____	Now Later
2. Deliver programs covering a diverse range of career development issues (for example, exploration, pre-employment/life skills, planning, transition, job search, job adaptation, job maintenance, personal/interpersonal skill development)	Yes No	____	Now Later
3. Teach career/life curriculum courses and programs	Yes No	____	Now Later
4. Deliver, and adapt as needed, programs for specified populations	Yes No	____	Now Later
5. Establish collaborative arrangements with other program deliverers in planning and delivering career development programs	Yes No	____	Now Later
Professional Conduct Skills:			
1. Knowledge of code of ethical standards of career development professional organization	Yes No	____	Now Later
2. Ability to apply ethical standards to career counselling issues and situations	Yes No	____	Now Later
3. Ability to recognize and act on need for personal professional training and development	Yes No	____	Now Later
4. Ability to recognize own limitations and seek assistance or refer as appropriate	Yes No	____	Now Later

Adapted from National Career Development Association (NCDA) Career Counselling Competencies, NCDA Professional Standards Committee, The Career Development Quarterly, June 1992; and Hoskins, M., and Stypka, K., Constructivist Counselling: A Facilitator's Guidebook (*Working Copy*), University of Victoria, Victoria, British Columbia.

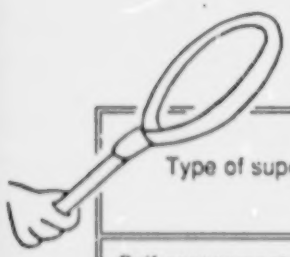
5.3c Staff Development Planning

In planning for your skills development, there are two related but different aspects that you may want to review:

a) the type of ongoing supervision and/or professional coaching that you receive;

b) the specific activities you may wish to build in for skill acquisition or skill enhancement.

As a first step, please indicate in Work Sheet #5-3c how often you receive the following types of supervisory assistance. **If you don't receive a particular type of supervision or don't want to receive it, simply leave the item blank.**



Work Sheet #5-3c
Types of Supervision I Receive and Desire

Type of supervision	Present frequency:			Desired frequency:		
	At least once a month	Once a year	Ongoing	Just the same	More often	Less often
Self-assessment						
Supervisory review of: Work with client Administrative issues Case files	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
Peer review						
External review procedures						
Case conferencing						
Group presentations						
Group problem-solving						
Coaching						
Update on career tools						
Update on labour market information						
Other: _____						

Now that you have filled in Work Sheet #5-3c, please note any items where you have indicated that you would like more or less supervision. Then make a note of these items in your staff development planning guide in Work Sheet #5-3d.

The planning guide below in Work Sheet #5-3d has two parts, one for supervisory assistance and the other for specific skills training:

> For Part A, please review your answers in Work Sheet #5-3c and then fill in up to three types of supervisory activities that you would like to have changed.
>
> For Part B-1, please review your answers in Work Sheet #5-3b and pick one of the skills where your skill level was "3" or lower and you had indicated "now" as your time frame. Write in the skill and then, in consultation with your supervisor, fill in how you will get the skill training, what your first step is, when you will start, when you will be finished, and how you will know that your skill level has improved ("success indicator").
>
> For Part B-2, please review your answers in Work Sheets #5-3a and #5-3b and pick an area of skill training that will allow you to assume new job responsibilities in which you are interested.
>
> For Part B-3, please review your answers in Work Sheets #5-3a and #5-3b and select an interpersonal skill that you would like to improve which will help you do your job better.

We recommend that you focus on no more than three skills (one per area) each year in order to avoid overburdening yourself. In planning for staff development, it is best to attempt manageable goals to ensure success.

Work Sheet #5-3d
Planning Guide for Counsellors

Part A: Supervisory Assistance

1. Change desired in supervision _____
   First step? _____
   Starting when? _____

2. Change desired in supervision _____
   First step? _____
   Starting when? _____

3. Change desired in supervision _____
   First step? _____
   Starting when? _____

Part B: Skills Development

1. Work task skill to be acquired _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

2. Work task skill to be improved _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

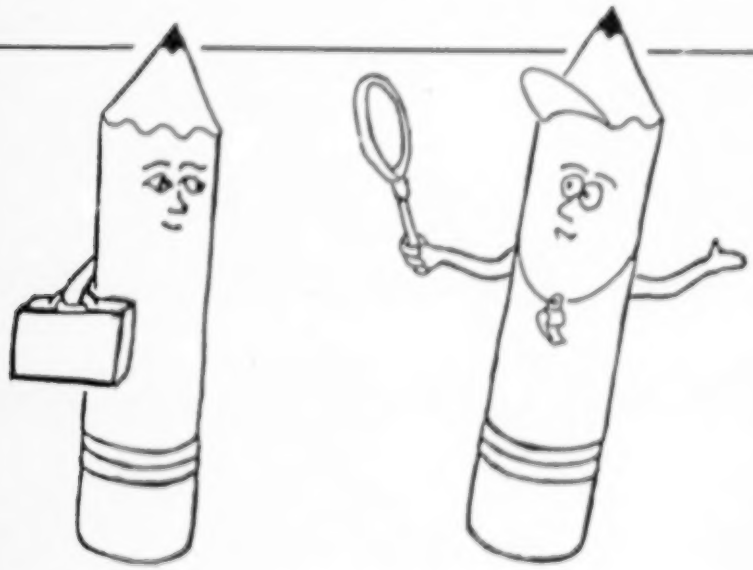
3. Interpersonal skill to be improved _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

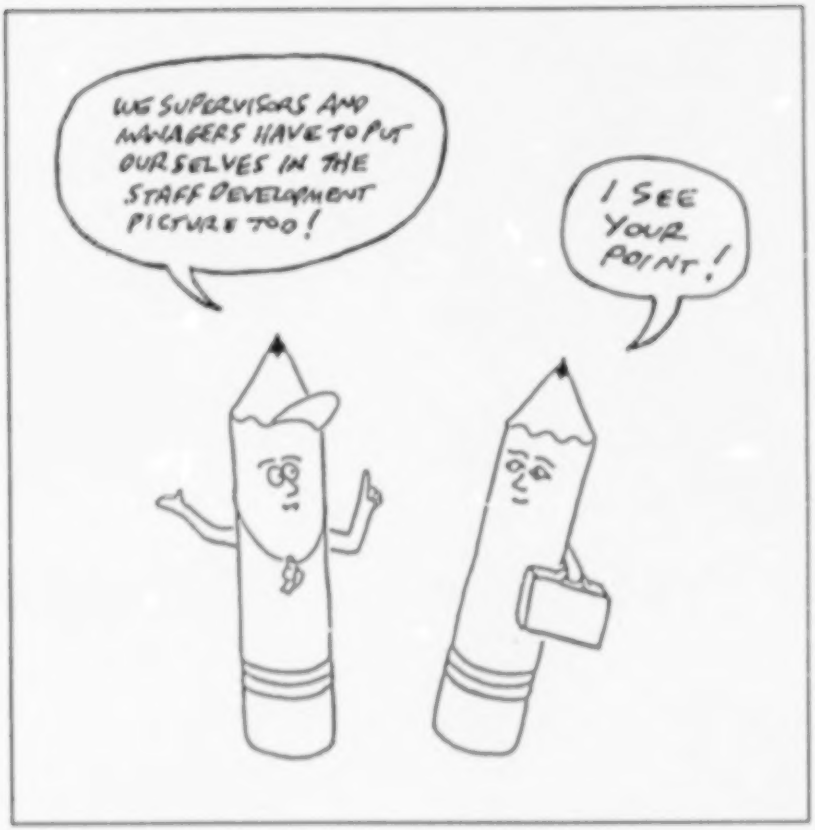
Now that you have had a chance to create a plan for your own staff development plan, what additional support do you need from your supervisor or agency in order to implement your plan?

____ Permission to job shadow
____ Permission to cross-train
____ Permission to restructure/enrich my job
____ Work time for self-study
____ Other _____

The quality of career counselling services in Canada depends on each of us investing in staff development. We hope that you will be able to arrange with your agency to receive the support you need to continue to develop your professional skills.

Staff Development Planning
SUPERVISORS AND MANAGERS




WE SUPERVISORS AND MANAGERS HAVE TO PUT OURSELVES IN THE STAFF DEVELOPMENT PICTURE TOO!
I SEE YOUR POINT!

5.4 Staff Development Planning for Supervisors and Managers

This section is designed to help you as managers and supervisors do staff development planning for yourselves through three activities:

a) inventorying your present supervisory responsibilities
b) self-assessing your own level of supervisory skills
c) creating a plan for your ongoing staff development

We have assumed that every professional has a "supervisory" or "mentor" relationship with someone for their own ongoing professional development. For those of you in managerial positions, your "supervisor" may be someone you have selected as a "mentor" from outside the organization. Please use whatever terminology is fitting for your circumstances.

We would encourage you to solicit input from others as you go through the self-assessment process — your "mentor", manager and/or colleagues — to assist you in developing a balanced picture of your own strengths and staff development challenges. You will need to bear in mind two types of responsibility, one regarding your own staff development and the other regarding staff development assistance for those you supervise.

Since resources are not unlimited, it is important that you clarify from your management, or in your own budget, the level of resource support available:

Number of paid staff development days ____ days
Staff development expense budget $ _____

If you believe the resourcing level to be inadequate, you need to resolve this matter before devoting more energy to staff development planning.

5.4a Inventory of Present Responsibilities

Please describe, using Work Sheet #5-4a, the supervisory responsibilities that you presently have or would like to have. These responsibilities are what make up your job description, in whole or in part.

Work Sheet #5-4a
Supervisory Responsibilities That I Have

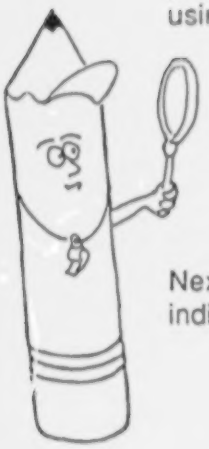
Responsibility	Do you presently perform the task?	If "No," do you want to perform the task?		
		Yes	Perhaps	No
Communication with Staff:				
Provide information to staff	Yes No	____	____	____
Seek information from staff	Yes No	____	____	____
Timely completion of paperwork	Yes No	____	____	____
Skill Development with Staff:				
Provide written job descriptions	Yes No	____	____	____
Provide initial orientation	Yes No	____	____	____
Provide criteria for promotion	Yes No	____	____	____
Provide performance feedback	Yes No	____	____	____
Initiate new ideas	Yes No	____	____	____
Problem-solve difficulties	Yes No	____	____	____
Coach in trying new skills	Yes No	____	____	____
Set annual development targets	Yes No	____	____	____
Evaluate outcome of training	Yes No	____	____	____
Ensure professional ethics	Yes No	____	____	____
Staff Work Completion:				
Plan/priorize unit work	Yes No	____	____	____
Assign/delegate tasks	Yes No	____	____	____
Motivate staff	Yes No	____	____	____
Monitor progress against deadlines	Yes No	____	____	____
Conduct performance appraisals	Yes No	____	____	____
Staff Administrative Support:				
Ensure staff have resources	Yes No	____	____	____
Ensure staff have authority	Yes No	____	____	____
Advocate for staff	Yes No	____	____	____
Other Supervisory Responsibilities	Yes No	____	____	____

NOTE: Any supervisory services that you want to be offering, but don't at present, should be noted for the staff development planning you will be doing in Work Sheet #5-4d.

5.4b Self-Assessment of Supervisory Skills

Each of us is better at some parts of our job responsibilities than others. Work Sheet #5-4b asks you to rate your present level of expertise for each type of skill you need to use in your present job. You will be identifying the areas in which your skills are fine as well as those areas in which you may need or want further skill development. Not all of the skills listed will be of relevance to each of you so the first question posed is whether or not the skill set is relevant to your work.

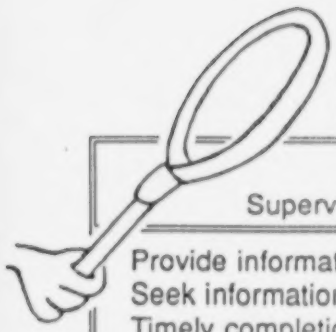
For each skill that you consider relevant (i.e., that you need to have in order to provide the services for which you are responsible), please rate your skill level using the following 5-point scale:



5 = excellent
4 = very good; very effective in this part of my work
3 = good; acceptable performance but could improve
2 = fair; need to enhance my skills in this area
1 = poor; need to acquire skills in this area

Next, for any skill areas where you would rate yourself as a "3" or lower, please indicate your time priority for addressing this skill area using the two categories:

Now = plan staff development during this year
Later = development planning postponed until next year



Work Sheet #5-4b
Self-Assessment of Supervisory Skills

Supervisory Skill	Is skill relevant?	Skill level	Time
Provide information to staff	Yes No	____	Now Later
Seek information from staff	Yes No	____	Now Later
Timely completion of paperwork	Yes No	____	Now Later
Provide written job descriptions	Yes No	____	Now Later
Provide initial orientation	Yes No	____	Now Later
Provide criteria for promotion	Yes No	____	Now Later
Provide performance feedback	Yes No	____	Now Later
Initiate new ideas	Yes No	____	Now Later
Problem-solve difficulties	Yes No	____	Now Later
Coach in trying new skills	Yes No	____	Now Later
Set annual development targets	Yes No	____	Now Later
Evaluate outcome of training	Yes No	____	Now Later
Ensure professional ethics	Yes No	____	Now Later
Plan/priorize unit work	Yes No	____	Now Later
Assign/delegate tasks	Yes No	____	Now Later
Motivate staff	Yes No	____	Now Later
Monitor progress against deadlines	Yes No	____	Now Later
Conduct performance appraisals	Yes No	____	Now Later
Ensure staff have resources	Yes No	____	Now Later
Ensure staff have authority	Yes No	____	Now Later
Advocate for staff	Yes No	____	Now Later

5.4c Staff Development Planning

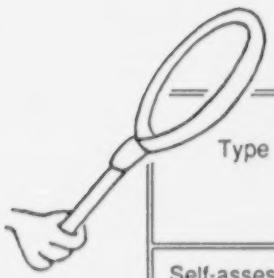
In planning for your staff development, there are three related but different aspects that you may want to review:

a) the type of ongoing supervision and/or professional coaching that <u>you</u> receive as a supervisor;

b) the specific activities you may wish to build in for skill acquisition or skill enhancement.

c) your skill level in assisting other staff with staff development.

As a first step, please indicate in Work Sheet #5-4c how often you receive the following types of supervisory/coaching assistance. **If you don't receive a particular type of supervision/coaching <u>or</u> don't want to receive it, simply leave the item blank.**



Work Sheet #5-4c
Types of Supervision/Coaching I Receive and Desire

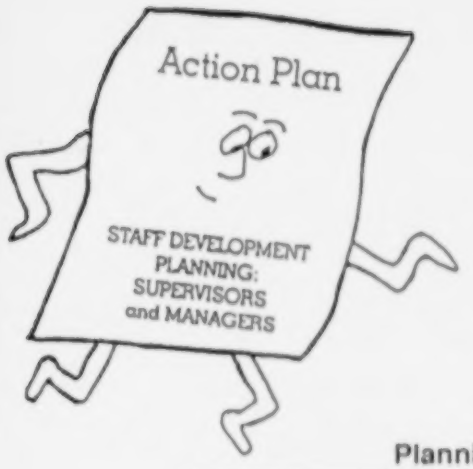
Type of supervision	Present frequency:			Desired frequency:		
	At least once a month	Once a year	Ongoing	Just the same	More often	Less often
Self-assessment						
Manager review of: Staff mentoring and coaching Administrative work Unit output	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____	____ ____ ____
Peer review						
Expert review procedures						
Coaching						
Update on staff tools						
Update on labour market information						
Other: _____						

Now that you have filled in Work Sheet #5-4c above, please note any items where you have indicated that you would like more or less supervision. Then make a note of these items in your staff development planning guide in Work Sheet #5-4d.

The planning guide in Work Sheet #5-4d below has two parts, one for supervisory assistance and the other for specific skills training:

> For Part A, please review your answers in Work Sheet #5-4c and then fill in up to three types of supervisory activities that you would like to have changed.
>
> For Part B-1, please review your answers in Work Sheet #5-4b and pick one of the skills where your skill level was "3" or lower and you had indicated "now" as your time frame. Write in the skill and then, in consultation with your supervisor, fill in how you will get the skill training, what your first step is, when you will start, when you will be finished, and how you will know that your skill level has improved ("success indicator").
>
> For Part B-2, please review your answers in Work Sheets #5-4a and #5-4b and pick an area of skill training that will allow you to assume new job responsibilities in which you are interested.
>
> For Part B-3, please review your answers in Work Sheets #5-4a and #5-4b and select an interpersonal skill that you would like to improve which will help you do your job better.

We recommend that you focus on no more than three skills (one per area) each year in order to avoid overburdening yourself. In planning for staff development, it is best to attempt manageable goals to ensure success.



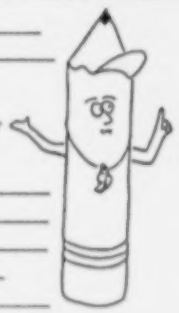
Work Sheet 5.4d
Planning Guide for Supervisors and Managers

Part A: Supervisory Assistance

1. Change desired in supervision _____
   First step? _____
   Starting when? _____

2. Change desired in supervision _____
   First step? _____
   Starting when? _____

3. Change desired in supervision _____
   First step? _____
   Starting when? _____



Part B: Skills Development

1. Work task skill to be acquired _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

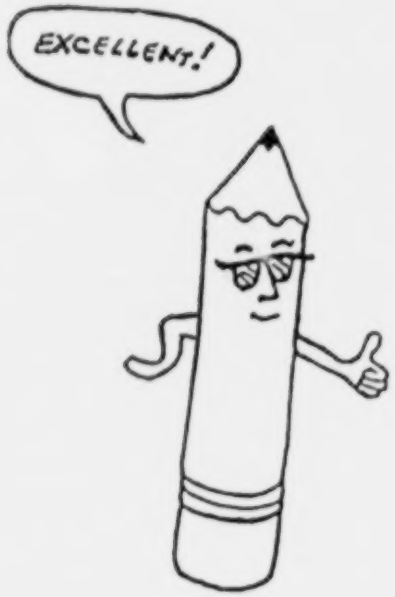
2. Work task skill to be improved _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

3. Interpersonal skill to be improved _____
   Type of assistance desired _____
   First step? _____
   Starting when? _____ Finishing when? _____
   Success indicator _____

Now that you have had a chance to create a plan for your own staff development, what additional support do you need from your supervisor or agency in order to implement your plan?

____ Permission to job shadow
____ Permission to cross-train
____ Permission to restructure/enrich my job
____ Work time for self-study
____ Other _____

The quality of career counselling services in Canada depends on each of us investing in staff development. We hope that you will be able to arrange with your agency to receive the support you need to continue to develop your professional skills.



5.5 A Framework for Human Resource Planning

Many managers are theoretically committed to the concept of "continuous career development" or a "training culture" or "life-long learning" but are unclear about the pragmatic implications. In order for an organization to be effective, managers have to balance the needs of the organization and the career aspirations of individual staff members. So there are two perspectives to be integrated in the human resource planning process: human resource development (from the perspective of the organization), and career planning (from the perspective of the staff member).

Organizational needs	<========>	Individual aspirations
Human resource development	<========>	Career planning

We have used the term *human resource planning* to refer to a process that integrates the organizational and individual staff member's perspectives at the point where they overlap. In other words, human resource planning extends beyond the individual staff person; and individual career planning encompasses life-long aspirations that extend beyond the staff person's tenure with your organization. Because of the variety of terms used to refer to various aspects of the human resource planning process, a glossary of terms is given in Table 5.1.

The basic components of the complete human resource planning cycle are shown in Table 5.2. The focus of Chapter 5 is on the third planning cycle phase: **staff development planning**. Planning for the first two phases was addressed in Chapter 3.

Effective staff development planning needs to ensure an appropriately skilled staff in an environment of rapid change. Because technologies and service expectations are constantly changing, staff must also be continually enhancing their skill sets — hence the emphasis on "life long learning." Therefore, organizations need to move beyond a simplistic approach of sending staff on "x" days of training to a more complex approach that focuses on the three categories of skills to be addressed in human resource development: work task skill remediation, work task skill enhancement, and interpersonal skills enhancement. With a proper balance of all three components of staff development, your organization will be well positioned to deliver quality service to clients.

Table 5.1
A Glossary of Terms

Term	Definition
Human resource development	An organization's process for making sure that appropriately skilled staff are available when they are needed
Human resource planning	The mechanism used by organizations in support of *human resource development* to ensure appropriate staff development in keeping with organizational goals (resulting in a human resource plan)
Human resource management	The personnel function that manages and monitors the implementation of the *human resource plan* in order to make sure that workers are being treated fairly and appropriately
Career planning	An individual's process of identifying an approach to work life in support of career goals
Staff development	An organization's process for ensuring that a particular staff person acquires the skills needed to perform effectively in the organizational context
Staff development planning	The mechanism used by organizations in support of *staff development* to identify how a particular staff person will acquire the needed skills

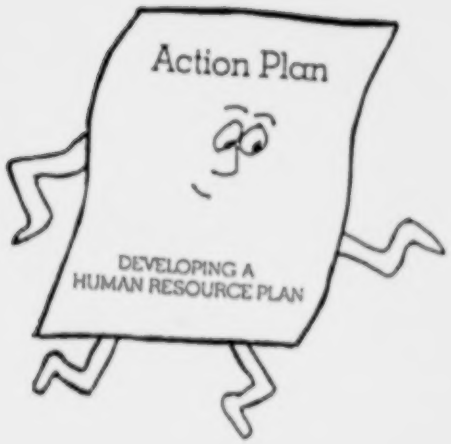


Table 5.2
Phases of the Human Resource Planning Cycle

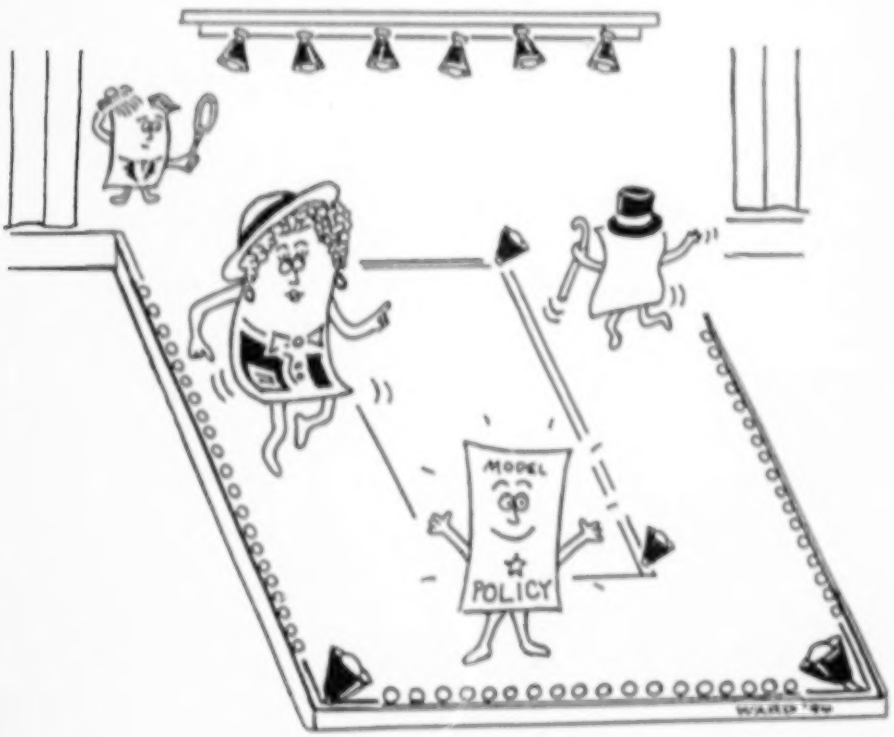
Planning Cycle Phases	Responsibility	Phase Components
Strategic planning	Manager	Define/clarify organizational goals
Human resource planning	Manager	Define staffing needed
	Supervisor	Identify the skill sets needed by staff
Staff development planning	Supervisor	Analyze the gaps between skills needed & present skills
	Manager	Priorize skill changes needed; communicate to staff
	Supervisor	Create career path projections
	Staff	Establish individual staff development plans
Organizational implementation	Manager	Resource & support the staff development plans
	Staff	Implement the staff development plans
	Supervisor	Evaluate staff development outcomes

A Farewell Note

Now you have had a chance to work with all the tools. We hope you have found the process worthwhile and that it helped you to:

- Articulate policies which are sensible for your organization, challenging and achievable by staff, and aimed at providing high quality for the client
- Establish standards to support action plans aimed at achieving quality
- Demonstrate that the careers of your own staff are important

We invite you to help Career Counselling develop further by forwarding to us copies of the policies and standards which have resulted from your work. As different organizations complete a similar process, these "model" policies and standards can be invaluable working tools for other organizations trying to organize or enhance career counselling services.



With your cooperation, we will be able to publish the policies and standards which we receive as a stand-alone resource book or as Part Three to a revised edition of the Policy Workbook. This "Action Plan" would represent a further way of continuing to use the Workbook as a developmental tool to lead to another generation of resource material.

Your feedback and suggestions for a revised version would be very much appreciated. Please use the following feedback form to send us your comments.

About the Authors

Dorothy I. Riddle, CMC, is President of Service-Growth Consultants, an international management consulting firm, and has worked with managers from Finland to Singapore on achieving service excellence. Prior to receiving her M.B.A., Dr. Riddle worked for twelve years training community mental health consultants and served on the Education and Training Board and the Board of Social and Ethical Responsibility of the American Psychological Association. Since 1989, Dr. Riddle has consulted with Human Resources Development (HRD) on a range of projects related to counselling and employment services, including developing the conceptual framework and implementation strategies for client-centred programming; designing training for employment counsellors in performance measurement; and strategic work on a model to support flexible delivery of quality services. Dr. Riddle serves on the Council of the Institute of Certified Management Consultants of Ontario and chairs the ISO 9000 Task Force of the Institute of Certified Management Consultants of Canada.

M. Lynne Bezanson is Executive Director of the Canadian Guidance and Counselling Foundation. She has experience in the development of quality counselling services in government, the private sector, and the educational system. Since 1990, she has managed the *Creation and Mobilization of Counselling Resources for Youth (CAMCRY)* initiative, on a Canada Interchange agreement from her HRD position as Acting Director, Employment Counselling Development Division. Within HRD (then CEIC), she was responsible for the development of the Competency Based Training Program in Employment Counselling and authored two of the texts. She also has had experience teaching, counselling, and consulting at the secondary school level and has an M.Ed. Under the CAMCRY initiative, she has been instrumental in establishing a network of working partners in all jurisdictions which deliver career education and counselling.

About the Illustrator

Valerie G. Ward works as a Consultant with the Canadian Guidance and Counselling Foundation and has a M.A. in Counselling Psychology. She joined CGCF's CAMCRY initiative in 1990 after nine years of working as a Counselling Consultant with CEIC, initially in B.C./Yukon Region then at national office, where she was responsible for the development of employment counselling services and for designing and implementing training programs for employment counsellors and supervisors. Under the CAMCRY initiative, Valerie has been a professional consultant/advisor to over twenty research and development projects ranging from career education curricula to counsellor training programs, video and interactive videodisc, computer-based projects, and the design of distance delivery programs. She has had a long-term interest in cartooning and illustration and finds great pleasure in bringing learning to life through humour.

Feedback Form

We sincerely hope you will send us copies of the policies and work plans which resulted from the discussions and exercises. We also need your feedback and suggestions on how we can improve this Policy Workbook for future users. We would very much appreciate your responses to the items below and would be delighted to receive narrative comments as well.

Your Organization: _____

Staff who used the Policy Workbook_____
(Managers, Supervisors, Counsellors, Support Staff, Supervisors & Counsellors etc.)

1. Please rate the extent to which the workbook was a useful resource, using the following scale:

   1 = Very useful
   2 = Useful
   3 = Only somewhat useful
   4 = Not useful

▲ Assess the adequacy of existing policies	1	2	3	4
▲ Articulate/revise policies to fit your organization	1	2	3	4
▲ Establish action plans in specific policy areas	1	2	3	4
▲ Establish standards to support action plans	1	2	3	4
▲ Assess the adequacy of existing human resource plan	1	2	3	4
▲ Establish appropriate human resource action plan	1	2	3	4
▲ Assess the adequacy of staff development plans throughout organization	1	2	3	4
▲ Establish staff development planning guides	1	2	3	4
▲ Implement a developmental process for policy and staff development	1	2	3	4
▲ Implement practices which support career development for clients and staff	1	2	3	4

2. What aspect(s) of the Policy Workbook did you find most useful?

_____

_____

3. What aspect(s) of the Policy Workbook did you find least useful?

_____

_____

4. In the space below or in a separate letter, please note any other comments and suggest any changes for future editions, (for example, sequencing, clarity, set-up).

_____

_____

_____

_____

_____

_____

5. Please fax your feedback, model policies, and action plans to CGCF
(613)-729-3515

or mail to CGCF
202 - 411 Roosevelt Avenue
Ottawa K2A 3X9

May we use your policies and action plans, properly acknowledged,in a stand-alone resource book or a revised edition of this Policy Workbook?

Yes____ Yes, but only after consultation ____ No ____

We thank you for your collaboration,

Dorothy Riddle and Lynne Bezanson

Quality Career Counselling Services
A Policy Workbook

The POLICY WORKBOOK is a user-friendly, self-instructional resource that assists organizations to move step-by-step toward completing comprehensive plans to enhance the quality of their career counselling services.

The POLICY WORKBOOK is also a tool to help individuals and organizations apply concepts such as "lifelong learning" and "a training culture" in the workplace.

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